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US Food Exporter's Guide to Japan 2002

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Report Highlights:

This report provides practical tips to U.S. companies on how to do business in Japan and build position in the world's largest market for imported consumer food products. It includes information on local business practices, consumer preferences, food standards and regulations, import and inspection procedures, distribution structure and trends, and best high-value product prospects.

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US FOOD EXPORTER'S GUIDE TO JAPAN

Building Position in the World's Largest Market for Imported Consumer Food Products

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US Agricultural Trade Office, American Consulate-General, Osaka

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Prepared by Promar Japan and the
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A Message from the US Agricultural Trade Offices

Welcome to Japan, the world's largest market for imported consumer food products and the largest customer for U.S. food and agricultural exports! We look forward to working with you towards your success in this dynamic market.

To assist you, we at the US Agricultural Trade Office (ATO) have prepared this Exporter's Guide, the emphasis of which is on high value consumer foods and edible seafood products. Its objective is to provide clear helpful information to US companies which export, or plan to export, to Japan. It is organized into four sections and an appendix as follows:

- **Market preview**
A brief description of the huge market opportunity that Japan represents, plus how US exporters may best fit within it.
- **Exporter business tips**
A few practical ideas on competing within this market.
- **Distribution structure and trends**
How food products move to the Japanese consumer today and how these channels may change in the future.
- **Best high-value product prospects**
Some of the hottest current import prospects in Japan.
- **Appendixes**
Other useful information and lists of contacts and potential customers.

To those of you exporters who are new to Japan, we believe you will find this guide invaluable as a starter kit to participation in this dynamic market. To those of you who are old Japan hands, we believe you may also find some useful information not considered previously.

We invite you to contact our offices in Tokyo or Osaka if we can assist you in building your Japanese business in any way or if you have questions or comments on this guide.

Gambatte Kudasai!*

US Agricultural Trade Offices in Japan

* Good luck (or technically in Japanese - "Do your best!")



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I Market Overview

Japan continues to represent one of the best opportunities in the world for US exporters of food products. Do not be turned away by what you may have heard about recession, unemployment, closed markets, distribution problems, etc. If you... *have a quality product that meets the need and wants of the Japanese consumer, which can be produced and delivered competitively, and have patience...* you can build an attractive market position in Japan!

Japan's market for high value foods and beverages has changed dramatically in the last 10-15 years. In spite of a decade long recession, the Japanese import market has remained strong, trade barriers have eased, distribution has become simpler and more direct, and opportunities for creative marketers have increased.

GDP growth has indeed been anemic during the 1990s. Consumer income has continued to grow, albeit modestly. In 1990 per capita GDP was 3.53 million yen, and in 2000 it reached 3.86 million yen (\$35,000)*, an increase of 10%. At the same time, the household share of income paid for food has been virtually stable.

Yes, Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) works actively to support the interests of Japanese farmers. Nonetheless, since 1990, food imports in most categories have risen while Japanese agricultural production has declined. As a result, the country's self-sufficiency ratio has declined as Japan has become more, not less, dependent upon food imports. Note the following:

Changes in Japanese Food Imports and Self-sufficiency				
	1990	2000	2000	Change
Food Imports	¥ billion		\$ billion	
Consumer-oriented food	2,190	2,580	23.9	18%
Edible seafood	1,480	1,615	15.0	9%
Total consumer food	3,670	4,195	38.9	14%
Self-sufficiency Ratio¹	47%	40%		-15%

¹ Domestic food production as a share of total consumption - calorie basis
 Sources: Japan Customs; Ministry of Agriculture, Forestry and Fisheries (MAFF)

* In this guide we will quote most statistics in Japanese yen, because year-to-year changes expressed in dollars can distort those differences. In any comparison we will also show comparable dollar figures for the latest year so that readers can easily understand the magnitude of the statistic expressed. Actual averages for exchange rates are shown in Figure A-3.

During the last decade it has also become easier for exporting countries, including the United States, to do business in Japan. Distribution has become somewhat more direct as larger buyers and manufacturers, retailers and food service companies seek to minimize the number and types of wholesalers with whom they deal. The Japanese operations of US and other western companies - e.g., Costco and Carrefour which are heavily geared to imports - are increasing their investment in the retail food business. McDonald's, Starbucks, Domino's, and other US food service companies continue to expand their presence. And many traditional Japanese food service chains are increasingly sourcing US suppliers for their food products - e.g. beef, pork, potatoes, and ingredients.

In fact, in Japan, many opportunities exist for alert US exporters. Just a few examples include:

- ! functional food and drinks for the increasingly health-conscious;
- ! prepared precooked foods for the convenience-conscious Japanese consumers;
- ! products in easier-to-open containers for the rapidly growing elderly population;
- ! and others, from the basic - canned corn is still a growing market - to the unique - prepackaged, frozen "bento" lunch boxes flown in from California.

In summary, the Japanese market offers many pluses to US exporters; but, it is not without difficulties. To put these opportunities in perspective, a few of the most important US "Advantages" and "Challenges" are shown in the table below:

US Advantages	US Challenges
! US food cost competitiveness	! Weak yen versus strong dollar
! US product variety - from fresh to ingredient to processed	! Declining price competitiveness
! Reliable supply of US agricultural products	! Prolonged Japanese recession
! Advanced US food processing technology	! Long distance from Japan
! Positive images of American sources - such as many of the tourist destinations	! Consumer antipathy for biotech foods
! Relatively low US shipping costs	! Japanese preoccupation with quality
! US science based and transparent food safety procedures	! Consumers "prefer" Japanese products
! Growing Japanese emulation of US cultural and food trends	! High cost of marketing
! Japanese food processing industry seeking new ingredients	! Japan's policy and actions to try to increase self-sufficiency
! Japanese distribution becoming increasingly like that of the United States	! Labeling laws that are often difficult
! Fewer Japanese farmers	! High duties on many products
! Higher Japanese farming costs	! Differences in port inspection interpretations
	! Low cost, increasing Chinese competition
	! Sometimes subsidized European exports
	! The requirement that US exporters commit to long-term involvement

II Export Business Tips

The following are a number of thoughts about exporting food products to Japan that have been collected from a variety of sources. Some are obvious, but warrant repeating. Some may never have been considered. They are organized under five topics:

- ! Dealing with the Japanese
- ! Consumer preferences, tastes and traditions
- ! Export business reminders
- ! Food standards and regulations
- ! General import and inspection procedures

We hope these suggestions will prove useful in your efforts to build food exports to Japan.

Dealing with the Japanese

Japanese business people - no matter how Western they may appear - do not always approach business relations in the same way as Americans or Europeans. Much of this is because of difficulties between the English and Japanese languages. And some are due to differences in deeply held traditions and practices. To help bridge the gaps, we suggest that you:

- Speak slowly and clearly to every Japanese, even if you know he or she speaks English.
- Use clear-cut basic words and language when writing in English.
- Use e-mail and fax, rather than telephone, whenever possible.
- Make appointments as far in advance as practical.
- Carry plenty of business cards - "meishi." Present them formally at each new introduction. And be sure they have your personal information in Japanese on the back side.
- Be on time for all meetings; the Japanese are very punctual.
- Expect negotiations to require a number of meetings and probably several trips to reach agreement.
- Be prepared for misunderstandings; deal with them with tact and patience.
- Be aware that in Japanese "hai" (yes) may mean "I understand," not "I agree."
- Limit the discussion of business at evening meals, or when drinking with new Japanese counterparts; these occasions are for getting to know one another and building trust.
- Be aware of major Japanese holiday and business break periods, e.g., the New Year holiday (approximately January 1-7); Golden Week, a combination of national holidays (April 29 - May 5); Obon, an ancestor respect period lasting for about one week in mid-August during which many companies close plants and business people take vacation.

Consumer Preferences, Tastes, and Traditions

These ideas may help in focusing your product approach. The Japanese consumers:

- Value quality highly; producers that do not respect this characteristic will fail.
- Are well educated and knowledgeable about food and its many variations (witness the high number of food TV shows and magazines)
- Appreciate taste and all of its subtleties - and will pay for it.
- “Eat with their eyes” and often view “food as art.” A food product’s aesthetic appearance - on the shelf, in its package, on the table - ranks high in building its acceptance.
- Place value on attractive and effective packaging.
- Support brands; a brand with a quality image will sell.
- Have strong positive feelings about seasonal foods and freshness; awareness and promotion of these characteristics, where appropriate, can significantly build product sales and value.
- Have small families and homes with minimal storage space; thus large packages are impractical.

Again, as in the United States, there are differences in regional food practices, preferences, and tastes. To illustrate, the Kanto and Kansai regions are compared in the chart below.

Examples of Differences in Japanese Regional Food Preferences	
Tokyo (Kanto region)	Osaka (Kansai region)
<ul style="list-style-type: none"> • Somewhat less food cost conscious • More salty foods • More spicy products • More western products • More cuisine variety • Prefer pork • Prefer buckwheat “soba” noodles 	<ul style="list-style-type: none"> • Very food cost conscious • Less salty foods • Less spicy products • Somewhat less western products • More traditional Japanese foods • Prefer beef • Prefer wheat “udon” noodles • More Korean food emphasis

Export Business Reminders

The following are well known, but worthwhile, reminders about exporting to Japan.

- Before coming to Japan, use the many sources of US information - the Foreign Agricultural Service, state agricultural offices, JETRO regional offices in the United States (see Appendix F).
- Build at least a minimum team within your company to help on the Japan market.
- Limit your number of trading partners.
- Avoid exclusive agreements.
- Use metric terms.
- Quote CIF, unless the importer requests FOB pricing.
- Price competitively; exclude US based costs, e.g., domestic sales, advertising, marketing, etc.
- Ensure that all sales documentation is correct.
- Use letters of credit to reduce risk.
- Hedge export values with your US bank if concerned about exchange rate risks.
- Set up wire transfers for payments.

Food Standards and Regulations

Food standards and regulations are often difficult to deal with for US exporters. A few tips include:

- Study the current USDA FAIRS (Food and Agriculture Import Regulations and Standards) Report for Japan. This concise document - covering food laws, labeling, packaging, import procedures, and other key regulations - should be required reading for all exporters; it not only explains the basics but provides specific contact information for all the import agencies involved. (www.atojapan.org/market.html)
- Check carefully your food additive acceptability, e.g., preservatives, stabilizers, flavor enhancers. See Appendix F-4 for Japanese government approved testing laboratories in the United States.
- Make the same kind of checks on your planned labels.
- Verify all relevant import requirements with your Japanese customers who normally have the most updated information on Japanese regulations.
- Provide a detailed list of product ingredients to your Japanese partners to allow them to check their acceptability. Do not assume that US approval means Japanese approval.
- Contact, after reviewing the foregoing, the Agricultural Affairs Office in the US Embassy, Tokyo (agtokyo@fas.usda.gov) with any remaining questions on issues such as standards, tariffs, regulations, labeling, etc.

Import and Inspection Procedures

Your job is not complete when your product has been ordered and shipped. You still must get it through Japanese customs and port inspectors. The points outlined below should aid this process:

- As with standards and regulations, an initial review of the USDA FAIRS Report is essential to understanding these procedures.
- Know what specific tariffs apply to your product before pricing to potential customers. (Appendixes B-3 and B-4, www.apctariff.org)
- Do not forget that tariff rates in Japan are calculated on a CIF basis - and that Japan adds a 5% consumption tax to all imports.
- Do not send samples for preliminary checking unless they have been specifically requested.
- Recognize that customs clearance officials at some ports may be more stringent or different in their interpretation of the law. Therefore the least expensive or most convenient port may not be the best choice. Check with your local customer or agent.
- Be sure to complete all documentation carefully and accurately.
- For fresh products, check phytosanitary and other requirements in advance and obtain proper USDA inspections in the United States. (Appendix F-1, www.aphis.usda.gov, www.fsis.gov)
- Be alert that biotech agricultural products or ingredients in your products must have been approved by the Japanese government and may require specific labeling to be admitted to Japan.
- Organic products require Japanese government certification; differences in agreement as to how this must be accomplished between the US and Japanese governments are still to be resolved. Check with the Agricultural Affairs Office in the US Embassy (agtokyo@fas.usda.gov).
- Import documents that must accompany shipment include: 1) Import Notification; 2) required Health Certifications; 3) Results of Laboratory Analysis; 4) Manufacturer's Certification showing materials, additives and the manufacturer's process. (Note: Products imported for the first time may require more detail.)

III Distribution Structure and Trends

The exporter's single most important strategic decision - other than regarding the product itself - is how the company positions its product and moves it to the Japanese consumer, i.e., through retail, food service, and/or food processing channels. The table below summarizes the size and growth of each.

Food Sales by Major Sector in Japan

Food and Drink Sectors	Historic Market Size and Growth 1994 - 1999					Expected Market Growth 1999 - 2005	
	Sales			Share of Total Consumer Food Sales	1994 - 1999 Average Annual Change	Total Sector Sales Growth % per year	Total Import Growth % per year
	1994	1999					
	Trillion Yen	Trillion Yen	Billion Dollars				
Sales to Consumers							
Retail	38.7	38.5	338	54%	(0.1)%	-	1.0%
Home Meal Replacement	4.3	5.2	46	7%	3.9%	4.0%	5.0%
Food Service	27.7	28.1	247	39%	0.3%	1.0%	2.0%
Total	70.7	71.8	631	100%	0.3%	0.7%	1.7%
Sales to Food Manufacturers							
Total	22.1	28.0	246	-	5.0%	6.0%	8.0%
Sources: Food Service Industry Research Center; Ministry of Economy, Trade and Industry (METI); Promar estimates for 1999-2005							

Because of the recession, Japanese food and drink sales to consumers in the last five years have shown minimal growth. Sales of food products and ingredients to food manufacturers have been more active. Food and drink sales to Japanese consumers in 1999 totaled 72 trillion yen (\$631 billion); growth since 1994 was minimal, only 0.3% per year. Retail sales were the largest share of that total - 54%; however they were almost flat in that five year period, declining by 0.1% per year. Sales through the food service sector, representing 39% of the total, increased only nominally, at 0.3% per year. The single bright spot for consumer food sales was the activity of the Home Meal Replacement (HMR) sector which grew 3.9% per year and in 1999 reached 7% of total consumer sales. Sales to food manufacturers appeared even more attractive, demonstrating 5% annual growth over the 5 year period and reaching 28 trillion yen by 1999 (\$25 billion).

Assuming an end to the current recession within the next two years, expectations are for a somewhat brighter future. Retail will remain flat, but food service will begin to show slightly improved growth. HMR will continue to grow at a good rate. And sales to food manufacturers will continue their healthy pace. Most importantly, imports will show significantly better growth in each category than for the overall sector.

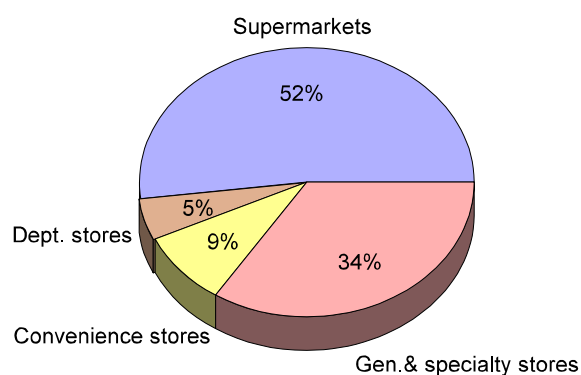
These three consumer food sectors - as well as food manufacturing are discussed in more detail below.

Retail Sector

The retail sector handles 54% of the food and drink products sold to consumers. Japan's retail food sector is dominated by the supermarket chains. These companies, especially the larger firms, represent excellent opportunities for US exporters of consumer food items. In addition to supermarkets, the retail sector includes two other types of stores that are prospects for imported food - department stores and convenience stores. The characteristics of the primary retail channels are compared in the following table.

Retail Store Opportunities for US Food Exporters					
Japan retail food market (% of food sales)	Supermarkets	Department Stores	Convenience Stores	General & Specialty Stores	Total Retail
	52%	5%	9%	34%	100%
Future growth expectations*	M	L	H	D	
Receptivity to imports**	H	H	L	L	
Especially good for:					
Established brands	H	H	L	L	
High quality/high price	M	H	L	M	
Good quality/low price	H	M	H	M	
New products	H	H	M	L	
*Growth expectations: H - high; M - moderate; L - low; D - decline					
**Receptivity ratings: H - high; M - medium; L - low					
Sources: MITI Commercial Census (1997); ATO and Promar estimates of import growth and receptivity					

Retail Food Distribution Channels



Supermarkets: Supermarkets, of which there are numerous chains (see Appendix C-1), account for the largest share of the overall retail sector. Supermarket chains offer excellent opportunities for the US exporter of fresh and frozen fruits and vegetables and chilled meats. These organizations also are most receptive to branded products with considerable retail success behind them. And, increasingly, these companies are looking for firms which can competitively supply quality products and are willing to contract long-term for private branding.

Supermarket distribution practices have changed a great deal in the last decade. In the early 90s the majors started buying direct from exporters to Japan. However by 1995 some of these stores, although they continued to negotiate directly with exporters, reverted to buying again from importers or trading companies. This occurred for several reasons: problems with accumulated stocks; the slowdown in business from the recession; and exchange losses. We expect this method of buying will persist for some chains; nonetheless, with increasing domestic competition, the pressure from expanding foreign retailers in Japan -most of whom import directly- and the need for cost efficiency to combat these threats, the long term trend for Japanese retailers must be to move toward more direct purchases.

There have been few supermarket mergers or joint ventures to date. However, the propensity is strong for such to occur. Some companies are still saddled with debt from aggressive investments made during the pre-1991 “Bubble Era.” Foreign retailers are increasingly investing directly in Japan. And the acquisitional arms of major European and American multinational retailers could well reach into Japan in the near future.

Department stores: Many US exporters are unaware of the potential prospects of department stores (Appendix C-3) in Japan’s retail food business. Although small in total consumption, they provide quality outlets for both specialty retailers - which subcontract space and sell through their venues - as well as for many other products that are purchased and sold directly by the stores themselves. If the exporter can offer new, high quality, and upscale products, department stores represent especially good opportunities, both directly and through contacts with their subcontracting partners.

Department stores, like supermarkets, have generally suffered due to the recession. We expect a number of consolidations in this sector over the next few years. However a number are doing surprisingly well in the current economic downturn. And, most importantly, food sales have remained strong for most of these businesses. Department store basements, where food is featured, have become very attractive opportunities for quality packaged and fresh products of all types.

Convenience stores: Convenience outlets (Appendix C-4) represent the most rapidly growing portion of the retail sector. They have not only expanded directly with new locations but have also grown through acquisitions. Moreover they are constantly adding services - ATM’s, bill paying, travel agencies - to attract customers. Convenience stores are interested in fast moving, high volume products that consumers can pick up and eat on the run. Snacks are a big item and their bento business for lunch and dinner is booming. The chains involved in this business are becoming buyers of not only imported food products, but also specifiers of ingredients for bentos and other food products provided by their supplying operations.

The foregoing positives notwithstanding, US exporters should recognize that competition for the business of these huge retailers (e.g., Seven Eleven is now Japan’s largest retailer) is very tough. Shelf space is difficult to achieve and maintain. Products are quickly replaced if they do not meet their turnover targets. Deliveries - sometimes 3-4 per day - are difficult. Unless a US exporter has high volume production and a close working relationship with a local partner who can provide the required service, competing for this business is formidable.

Specialty stores and general retailers: Japan’s business in many products is still dominated by specialty stores and shops, most of which are small mom and pop operations. These small operations are generally not good direct target markets for exporters but, instead, are best served by secondary or tertiary wholesalers which in turn are supplied by Japan’s major wholesalers. There are a few however - i.e., those that are part of chain operations - that are potential import customers. Fruit shops, bakeries, meat and some other specialty chains offer that potential.

Home Meal Replacement Sector

The Home Meal Replacement (HMR) sector accounted for 7% of food sales to consumers in 1999 and is, at present, likely 9-10% of that total. HMR includes bentos (lunch boxes), takeout sushi, takeout sandwiches and side dishes, and home delivery pizza, chicken, etc. HMR can be considered both food service and retail. Its production is like food service - or even

food manufacturing. Its major products are sold both through the food service sector and the retail channels - supermarkets, department stores, convenience stores, and of course, bento shops.

Bentos are big business in Japan and are one of the most rapidly growing of the food product categories. Essentially a meal in a box, usually with a significant rice component, bentos are produced throughout Japan. Because there are several large producers which buy much of their raw materials direct, they are potentially ideal customers for exporters, i.e., for those that are willing to meet their stringent cost, quality and size specifications. The major specialty bento producers are listed in Appendix D-5; many large retailers, convenience stores, and food service companies also produce or subcontract their own.

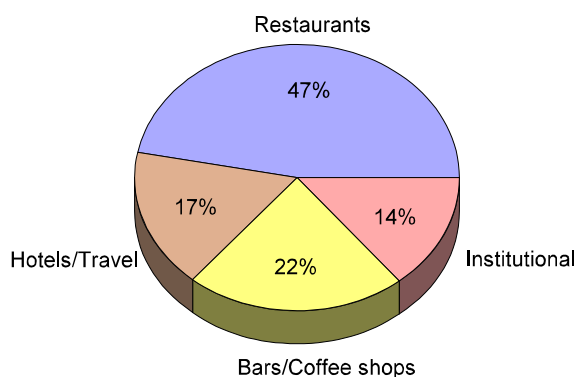
Food Service Sector

The Japanese food service sector accounted for approximately 39% of consumer food sales in 1999. Food service encompasses four major segments: restaurants; hotels and other accommodation facilities; bars/cafes/coffee houses; and institutional food operations, i.e., caterers servicing schools, hospitals, company facilities.

The characteristics of these four segments are summarized in the next table.

Food Service Opportunities for US Food Exporters					
Japan food service market (% of food service sales - 2000)	Restaurants	Hotels/ Travel related	Bars/ Coffee shops	Institutional	Total
	47%	17%	22%	14%	100%
Future growth expectations*	H	M	M	M	
Receptivity to imports**	H	H	M	M	
Especially good for:					
High quality/high price	H	H	L	L	
Good quality/low price	H	M	M	H	
New products	M	H	M	L	
*Growth expectations: H - high; M - moderate; L - low; D - decline					
**Receptivity ratings: H - high; M - medium; L - low					
Sources: Food Service Industry Research Center (2000); ATO and Promar estimates of import growth and receptivity					

Food Service Distribution Channels



Share of Restaurant Sales by Type of Outlet (2000)

General restaurants	71%
Noodle shops	9%
Sushi shops	11%
Other	9%
	<u>100%</u>

Source: Food Service Industry Research Center

Restaurants: Restaurants represent the best food service export prospects for the United States. Almost half of current food service sales are made through these outlets. The restaurant sector comprises four types of outlets as shown above. The overall restaurant sector, totaling about 13 trillion yen (\$12 billion), has been growing at an average of 2% per year. General restaurants, the largest segment, can similarly be broken down into several categories. Although slowing in the last decade, Western style restaurants have been the primary growth vehicle of the sector. Chain operations account for 80-90% of the food sold in this category. These organizations, including family restaurant chains like Skylark and Royal Host, represent major opportunities.

However, US shippers should not be dissuaded from pursuing the large chains of Japanese and Chinese restaurants which, in this case, account for 60-75% of food sales. Their customers consume large amounts of meat, chicken, vegetables, and food ingredients of all kinds. Although the Japanese outlets are a bit more biased toward domestic ingredients, these two categories still represent worthwhile customer candidates for US exporters. Noodle and sushi shops at first may appear unlikely opportunities, but their consumption of flour, vegetables, fish and ingredients is still substantial. And chains dominate (50-60% of the business) in these restaurants as well.

“Other restaurants” include a wide variety of categories - from Indian, Thai, Mexican, and other ethnic outlets to the most rapidly growing sector of all - fast food, e.g. hamburgers, fried chicken, and pizza in the Western category and okonomiyaki (an omelet variation) and gyudon (beef on rice) on the Japanese side. Most of these subsectors are dominated by chains and many are good prospects. While McDonald's and Pizza Hut are familiar to Americans, MosBurger (Japanese) and Lotteria (Korean) are also strong domestic players producing western-style fast foods. And some gyudon chains, like the fast growing Yoshinoya (Japanese), are big US beef buyers.

Most of the big restaurant chains can be dealt with directly (Appendix D-1), but for the smaller chains, exporters must build relationships with the trading companies or the major food service wholesalers (Appendix D-4).

Hotels and travel related: Major hotels in Japan can be excellent markets for US exporters. Most are chains and over 40% of their income is derived from their food operations. Hotels, especially, tend to be a bit more western food oriented and frequently have “food fair” promotions featuring different countries' cuisines. The exporter's challenge lies in developing effective distribution channels to reach them (Appendix D-2).

Hotels represent high visibility locations; their usage of a product has important promotional value in Japan. A presentation indicating that Product A is featured at a major upscale hotel chain, for example, is a good selling pitch to retailers and other prospective buyers.

Other travel related entities include the airlines and railroads. Both the Japan rail systems and the Japanese airlines have their own kitchens in Tokyo and Osaka; the Western airlines tend to use contract caterers. The Japanese organizations emphasize Japanese food and are somewhat less receptive to imported Western products.

Theme parks can also be considered as part of this sector. Japan's Disneyland in Tokyo is the prime example, drawing millions of visitors each year to not only its recreational facilities but its 54 restaurants and multiplicity of snack outlets. Disneyland is not alone. Universal Studios in Osaka opened in April 2001; it and other new theme parks around the country are now daily welcoming thousands of tourists.

Bars and coffee shops: These establishments in Japan currently represent 22% of total food service sales. Although growth in the former has turned negative, mainly due to the recession, coffee shops, especially chains, continue to show significant growth. Important impetus to this expansion has been the inroads from foreign chains such as Starbuck's. Both bars and coffee shops are major markets for not only drinks, both alcoholic and non-alcoholic, but food items as well.

Institutional food markets: The institutional market is made up of: business/office cafeterias - 52%; school meal programs - 13%; hospitals - 31%; and welfare facilities - 4%. Many of these operations are typically served by contract catering organizations (Appendix D-3). Building relationships with these companies is essential to crack this market. Both contract caterers and institutions with their own kitchens, are typically serviced by large food service wholesalers (Appendix D-4).

Food Manufacturing Sector

Appendix E (1-12) lists the most important food manufacturers in several major food sectors. These food processors offer various opportunities to US exporters and have the capacity to buy all of the following types of products from overseas:

- Ingredients for their own products
- Finished products, which they might sell under their own brand
- Finished products which they might sell under the exporter's brand, but distribute with their own brand

Dealing with food processors has other advantages, e.g.,

- They frequently buy direct
- They provide timely and sophisticated distribution
- They have a good understanding of their suppliers' businesses

One should keep in mind that an exclusive agreement with a Japanese food manufacturing company can lock a US supplier of branded foods into a single distribution channel. This disadvantage must be balanced against the pluses of dealing with these powerful food companies and the increased customer exposure, immediate sales, and higher volumes these relationships can often entail.

IV Best High Value Import Prospects

Many US products are good import prospects for Japan. In this section we present two lists of such prospects. The first lists “best prospects” as identified by the ATO and Promar. The second lists new products which were “hot” in 2001.

Best Prospects

The following presents a list of products which we believe might currently be considered “best” import prospects. Most were chosen for various reasons - high volume, demonstrated growth, and US competitiveness; all products rated A in Appendix B-1 were included for these reasons. Other products were picked because they are not generally available in Japan, because they fit a growing need - e.g., aging/health - or because they represent a unique concept that appears to offer significant potential. The products are listed in the chart below indicating the criteria under which they were chosen and, when available, US export value.

Selected Best Japanese Import Prospects									
Prospect products	Criteria for selection*								
	Size of 2000 import market (\$ mil)	US 2000 exports (\$ mil)	Growth of import market	US competitiveness	Low domestic availability	Working wives	Aging population	Health concern	Environmental concern
Pork	3,254	960	/	/					
Beef	1,670	905	/	/				/	
Tuna/bonito	2,125	26	/						
Crab	992	99	/	/					
Wine	800	63	/		/				
Pet food	667	290	/	/					
Cheese	550	28	/		/				
Fresh citrus	504	402	/	/	/				
Flatfish	216	65	/	/					
Prepared whole tomatoes	151	22	/			/			
Chocolate confectionery	143	29	/	/					
Fresh and frozen berries	59	43	/	/	/		/	/	
Specialty vegetables	NA	NA	/	/					
Portion-size meats	NA	NA	/			/			
Frozen desserts	NA	NA	/	/		/			
Frozen pizzas	NA	NA	/	/	/	/			
Functional foods	NA	NA	/	/			/	/	
Organic foods	NA	NA	/	/	/		/	/	/
Precooked meal ingredients	NA	NA	/		/	/			
Source: Japan Customs for statistics									
*Selection of prospects made by Promar Japan and the ATO									

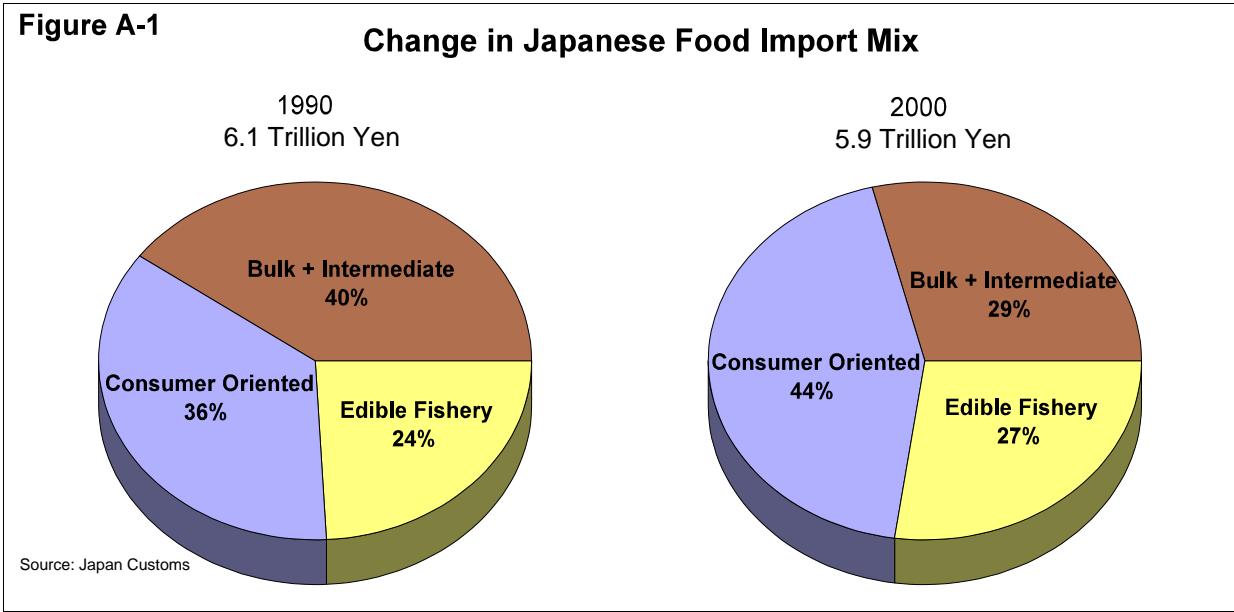
Successful New Products in 2001

In addition to the foregoing, the US exporter might wish to consider options which are suggested by one or more of the new products that were recently considered “hot” in the Japanese market.

	Sales Rank (2001)	Product	Manufacturer
Beverages	1	Sports drink	Coca Cola
	2	Milk (in PET container)	Snow Brand
	3	Lactic acid drink	Yakult
	4	Sports drink	Coca Cola
	5,10	Cider	Asahi Beverages
	6,8,9	Green tea products	Coca Cola
	7	Green tea	Kirin Beverages
Snacks	1	Chocolate snack	Nestle
	2	Chocolate almond snack	Meiji Seika
	3	Milk chocolate bar	Lotte
	4	Chocolate (with gift)	Meiji Seika
	5,8	Chocolate egg	Furuta
	6	Strawberry chocolate snack	Ezaki Glico
	7	Salted potato chips	Calbee
	9	Milk chocolate bar	Meiji Seika
	10	Chocolate bar	Fujiya
Frozen Foods	1	Fried rice	Nichirei
	2	Japanese fried rice	Katokichi
	3	Hamburger steak	Ajinomoto
	4	Ice cream - <i>marron glace</i>	Häagen Dazs
	5	Pizza	Meiji Milk
	6	Ice cream - crispy caramel	Häagen Dazs
	7	Fried rice (shrimp/pork)	Ajinomoto
	8	Spaghetti (mushroom/vegetables)	Nisshin Foods
	9	Ice cream - chocolate/macademia	Häagen Dazs
	10	Spring rolls	Nippon Suisan
Other Foods	1	Yogurt	Snow Brand
	2	Fermented soybeans (<i>Natto</i>)	Fresia
	3	Dried bonito	Ajinomoto
	4	Instant noodles	Toyo Suisan
	5	Instant noodles	Takano foods
	6	Cooking oil (low cholesterol)	Kao
	7	Yogurt - strawberry/blueberry	Calpis - Danone
	8	Instant noodles	Toyo Suisan
	9	Yogurt	Morinaga Milk
	10	Sausage	Snow Brand

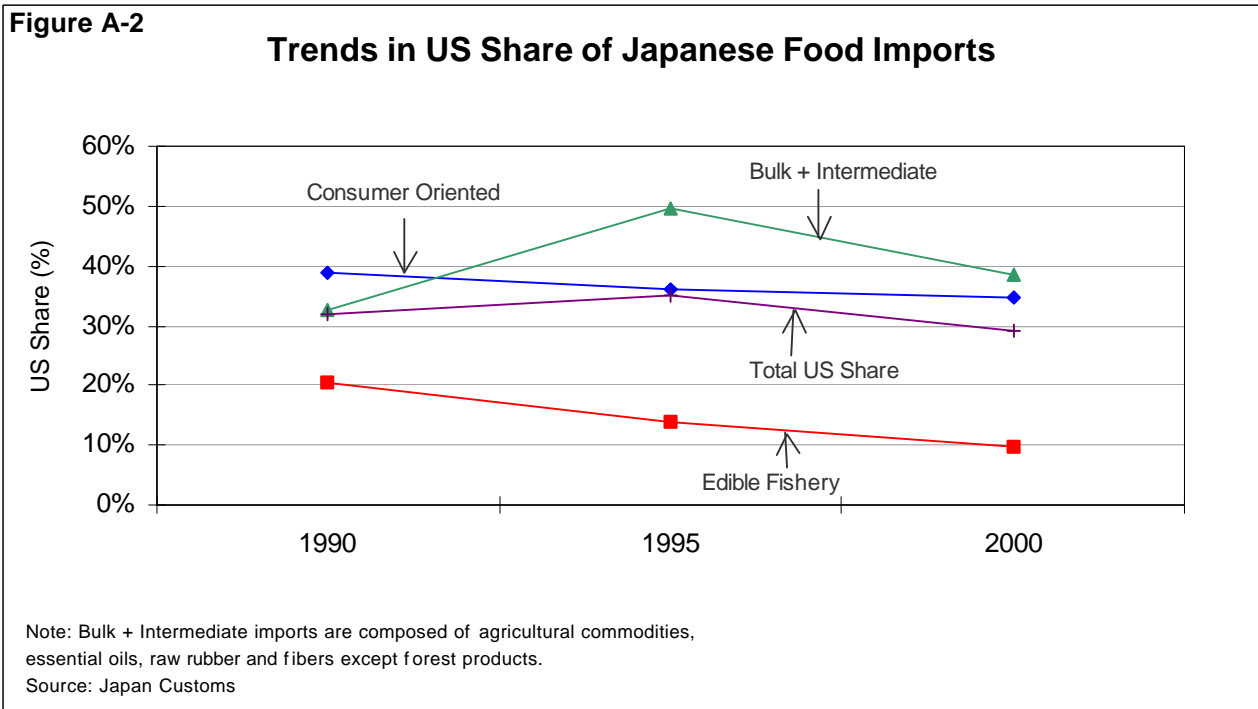
Source: Nihon Keizai Shimbun

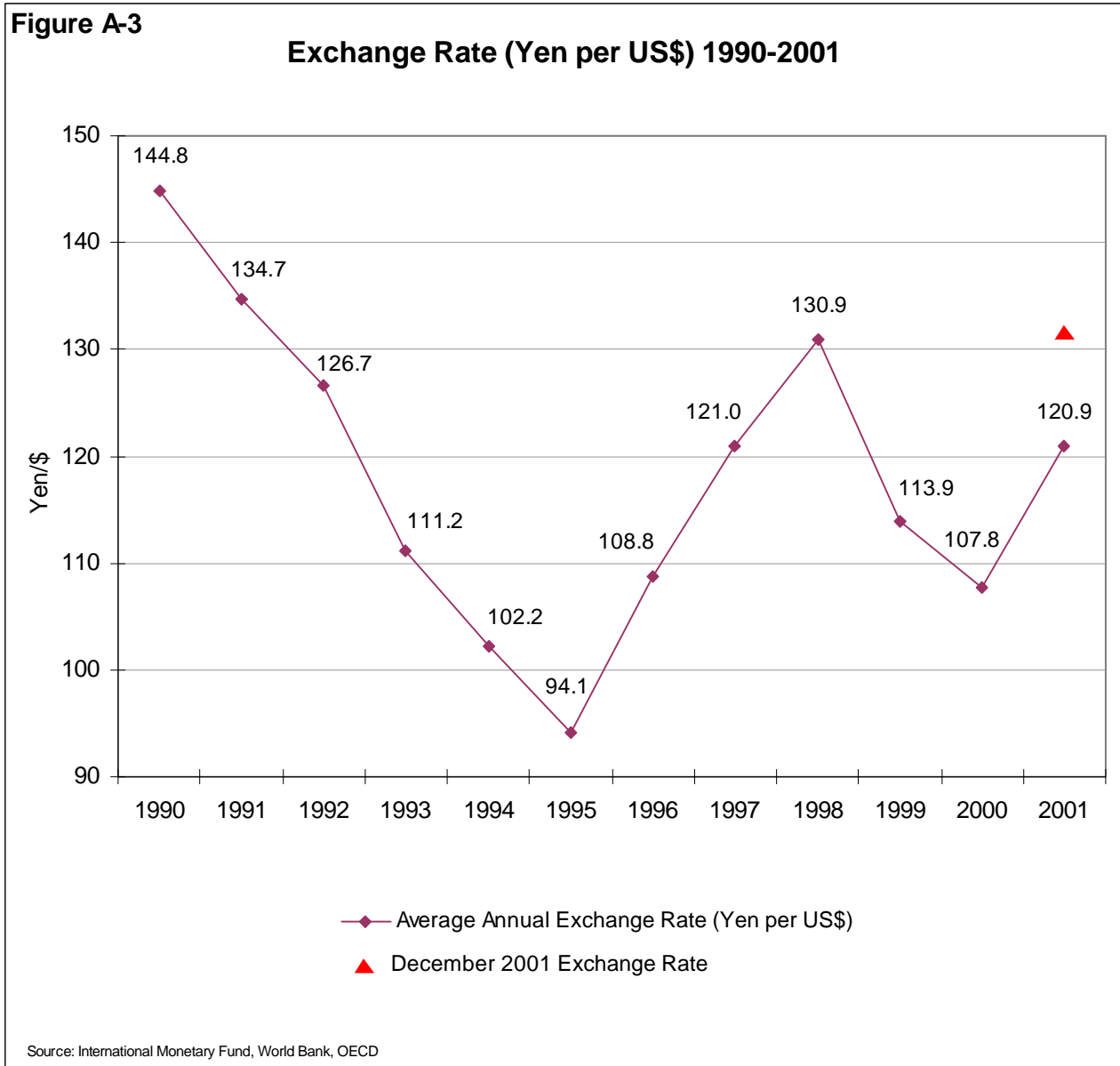
Appendix A: Key Trade and Demographic Information



Japan's total food imports remained high during the last decade at nearly 6 trillion yen (\$55.6 billion). However, the mix of imports changed dramatically. Bulk + Intermediate products (mostly commodities) accounted for 40% of imports in 1990 but only 29% in 2000. In contrast, Consumer Oriented and Edible Fishery products increased from 60% to 71% of total food imports. As shown below, between 1990 and 2000 the United States remained Japan's largest import supplier. However its share of total imports declined from 32% to 29% as other countries, especially China, increased market share. During this ten-year period the US import share of Bulk + Intermediate products increased, whereas that of US Consumer-Oriented products dipped and that of US Edible

Fishery declined significantly.

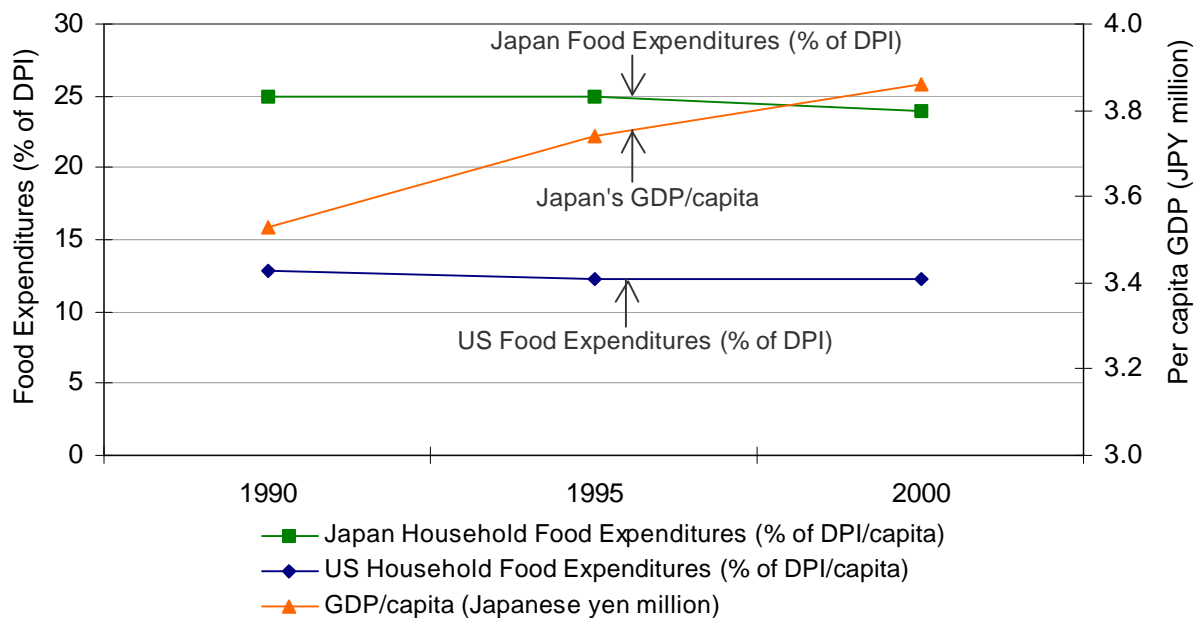




The value of Japanese yen relative to the US dollar appreciated in the first 5 years of the decade and has tended to decline since 1995. It declined to a 9 year low of 131 yen per dollar at the end of 2001. >

Figure A-4

Japan's GDP and Food Expenditures Compared to the United States



Source: MOF Japan & USDA/ERS

DPI: Disposable Personal Income

Nomi
n a l

per capita GDP in Japanese yen has grown over the last decade by nearly 10% in spite of the recession. Japanese household food expenditures, at 24% of the DPI, have been almost flat during the period. US food expenses, as a percentage of US DPI/capita, are approximately half that of Japan's. The comparison below illustrates, in a number of ways, why US agriculture is so much more competitive than that of Japan, and why US food expenditures are so much lower than Japan's.

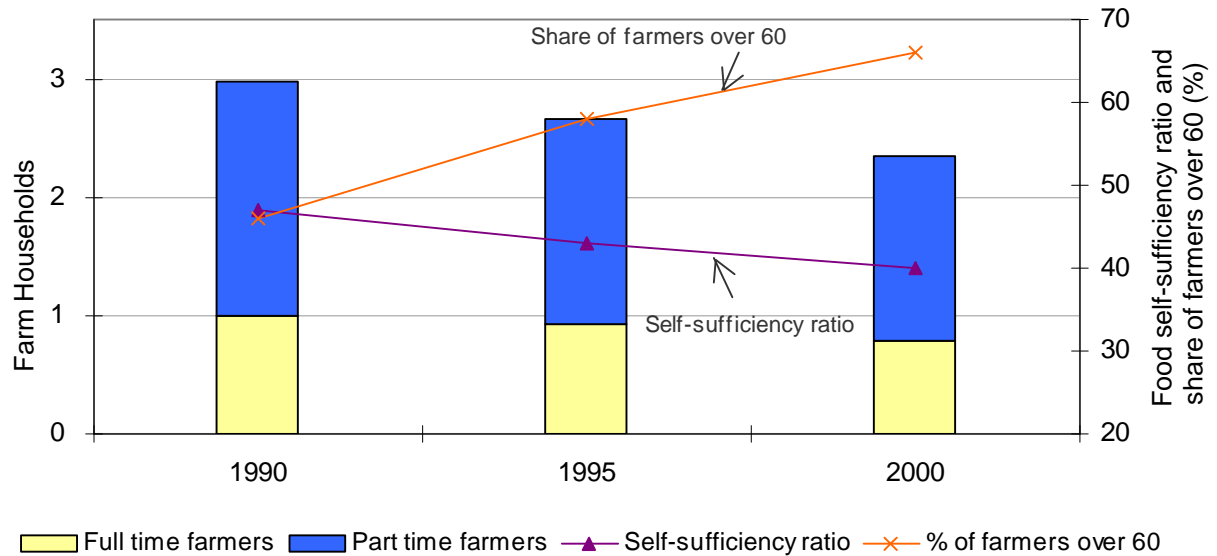
**Figure A-5 Comparative Data Between Japan and the United States
Which Influence Food Production and Consumption**

	Japan	United States
Population (mil)	127	278
Area (000 sq.mi)	146	3,718
Population density (people/sq.mi)	870	75
GDP (\$ bil)	3,800	8,200
GDP per capita (\$) Purchasing Power Parity Basis	24,900	36,200
Agricultural land (mil ha)	5	360
No. of farmers (mil)	3	2
Farmers % of the population	2.3	0.7
Farm average size (ha)	1.6	176.1
Price of farmland (\$/ha)	141,000	1,250
Avg. manufacturing labor costs (\$/hr)	16.9	11.5
Electricity costs (\$/KWh)	0.15	0.04
Gasoline prices (\$/liter)	1.04	0.39
PC ownership (per 100 persons)	20	41

Sources: MAFF; MOF; World Bank; USDA; CIA

Figure A-6

Japanese Food Self-sufficiency Ratio and Declining Farmer Population (1990-2000)



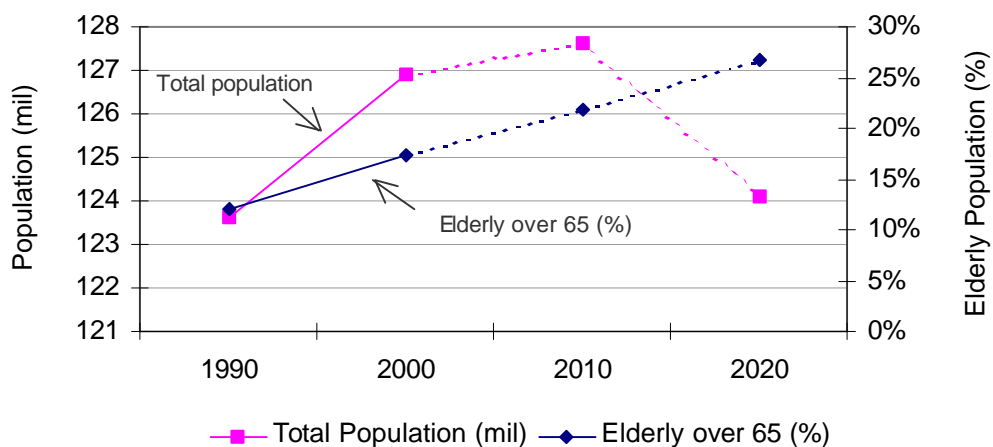
Source: MAFF Japan

Note: The self-sufficiency ratio calculation is the percentage of food (calorie basis) supplied by domestic sources compared to the total food supply, which includes imports.

In addition to growing imports, a reduction of farm households, combined with the farmers' aging, is influencing the continuing decline in the Japanese food self-sufficiency ratio from 47% in 1990 to 40% in 2000. As shown below, Japan's population growth slows, then declines from 2010 to 2020. The elderly increase from 12% of the population in 1990 to 27% by 2020. Of the world's developed nations, Japan has the fastest growing elderly population.

Figure A-7

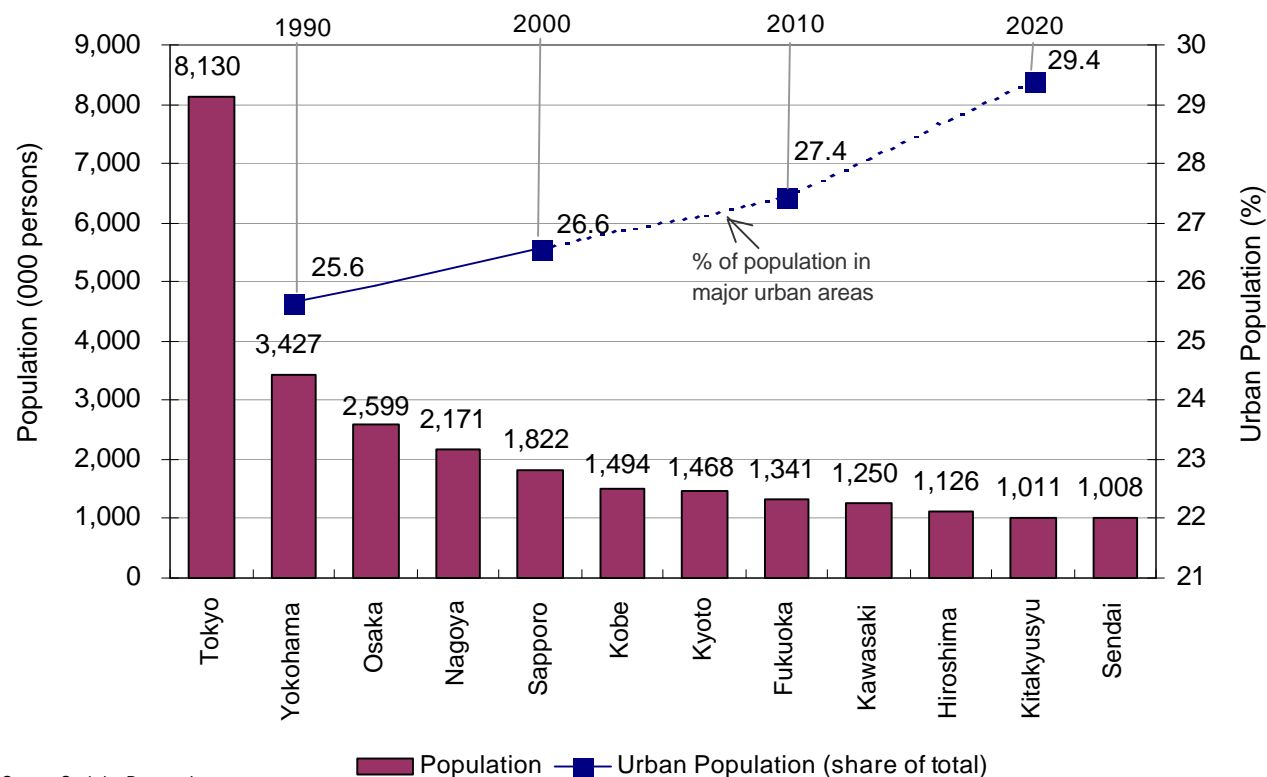
Japan's Population Growth and Expected Decline



Source: Statistics Bureau, Japan

Figure A-8

Major Japanese Cities and Urban Growth

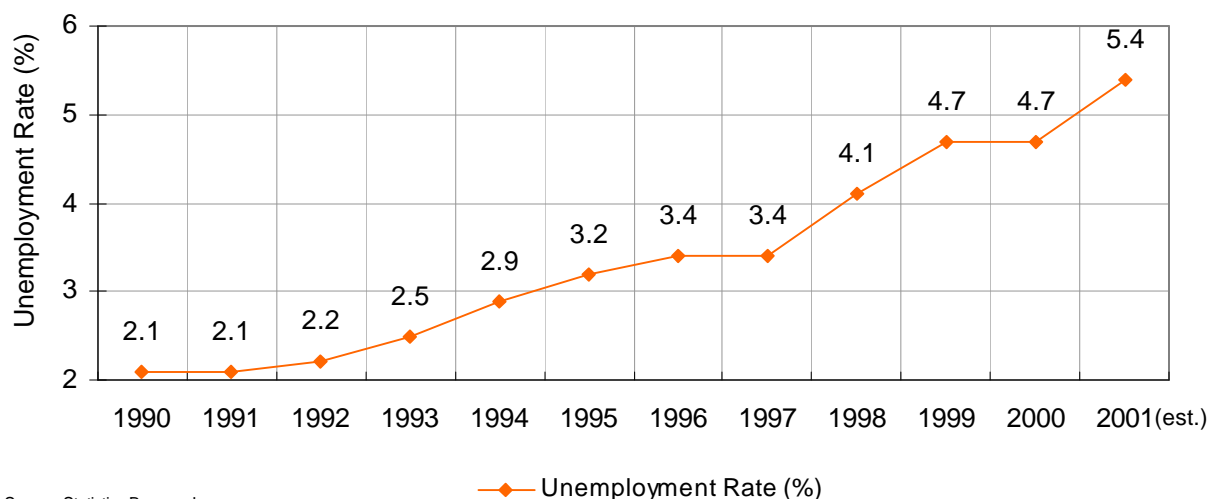


Tokyo

is Japan's largest single city by far. When combined with Yokohama, Kawasaki and other nearby prefectures (Chiba and Saitama), its metropolitan area accounts for 25% of the nation's population. The other major metropolitan areas are Osaka and Nagoya, which represent 16% and 9%, respectively. As shown below, Japan's unemployment rate has been steadily growing over the last decade. It reached record levels in 2001.

Figure A-9

Japanese Unemployment Rate



Appendix B: Imports and their Suppliers

Figure B-1 Japanese Imports & US Share of Top 30 Food and Fishery Imports									Rating*
Product Rank		1998			2000				
		Total \$ (mil)	US Imports		Total \$ (mil)	US Imports			
			\$ (mil)	Share (%)		\$ (mil)	Share (%)		
1	Pork	2,203	726	33	3,254	960	30	A	
2	Shrimp and prawns	2,767	4	0	3,042	6	0	C	
3	Beef	2,324	1,356	58	2,602	1,511	58	A	
4	Tuna and bonito	1,613	23	1	2,121	26	1	A	
5	Salmon and trout	933	244	26	1,077	173	16	B	
6	Crab	735	126	17	992	99	10	A	
7	Chicken	903	145	16	842	97	11	B	
8	Wine	1,288	84	7	800	63	8	A	
9	Eel - processed	644	0	0	792	0	0	C	
10	Coffee beans	1,015	5	0	788	4	0	C	
11	Pet food	574	223	39	667	290	44	A	
12	Cod roe	284	237	84	586	307	52	A	
13	Bananas	466	0	0	553	3	0	C	
14	Cheese	557	25	5	550	28	5	B	
15	Squid	399	0	0	434	8	2	C	
16	Octopus	348	0	0	363	0	0	C	
17	Whisky	361	77	21	358	74	21	B	
18	Sea urchin	196	99	51	267	107	40	A	
19	Frozen potatoes	268	235	88	256	213	83	B	
20	Grapefruit	203	172	85	255	210	82	B	
21	Brandy	290	5	2	254	2	1	B	
22	Surimi	234	201	86	238	220	92	B	
23	Flatfish	160	55	34	216	65	30	A	
24	Prepared cocoa products	169	15	9	174	13	7	C	
25	Mackerel	195	1	0	165	0	0	C	
26	Prepared tomatoes	146	20	14	151	22	15	A	
27	Herring roe	125	6	5	146	7	5	C	
28	Chestnuts	83	0	0	144	0	0	C	
29	Chocolate confectionery	119	28	24	143	29	20	A	
30	Mero	116	0	0	137	0	0	C	
	All other products	14,423	4,727	33	16,543	5,277	32		
	Total \$ (mil)	34,141	8,839	26	38,910	9,814	25		
	Total trillion yen	4.5	1.2		4.2	1.1			
Sources: Ministry of Finance, Japan; Ratings by Promar Japan and ATOs									
* Rating of US opportunity to increase exports: A - Excellent; B - Fair; C - Poor									
** Individual import items are converted to US dollars at 1998 and 2000 exchange rates (see A-3)									

Note: Between 1998 and 2000, imports of US goods rose in dollar terms but remained about the same in Japanese yen. Similarly total Japanese imports rose in dollar terms during the period whereas in yen they actually declined slightly.

Figure B-2		Top Suppliers of Japanese Food and Fishery Imports							
Suppliers of Consumer Oriented Foods					Suppliers of Edible Fishery Products				
Rank	1998	Share %	2000	Share %	Rank	1998	Share %	2000	Share %
1	United States	34.7	United States	34.6	1	China	13.5	China	15.2
2	China	12.2	China	13.9	2	United States	10.0	United States	10.2
3	Australia	7.6	Australia	7.8	3	Indonesia	8.4	Russia	8.6
4	Thailand	4.5	Denmark	5.1	4	Thailand	7.7	Thailand	7.5
5	France	4.2	Thailand	4.3	5	Russia	7.3	South Korea	6.6
6	South Korea	3.7	Canada	3.7	6	South Korea	6.5	Indonesia	6.4
7	New Zealand	3.2	France	3.2	7	India	4.9	Chile	4.7
8	Denmark	3.1	New Zealand	3.2	8	Chile	4.5	Taiwan	4.6
9	Brazil	2.7	South Korea	2.8	9	Taiwan	4.3	India	4.1
10	Canada	2.4	Brazil	2.2	10	Canada	4.0	Norway	4.1
11	Philippines	2.0	Philippines	2.2	11	Norway	3.7	Canada	3.6
12	Netherlands	1.8	Netherlands	1.7	12	Vietnam	3.1	Vietnam	3.3
13	Italy	1.8	Mexico	1.6	13	Australia	2.7	Australia	3.2
14	Mexico	1.5	Italy	1.4	14	Morocco	1.9	Morocco	1.9
15	Colombia	1.2	Germany	1.0	15	Philippines	1.4	Philippines	1.3
	Others	13.4	Others	11.3		Others	16.1	Others	14.7
	Total	100.0	Total	100.0		Total	100.0	Total	100.0
Source: Ministry of Finance, Japan									

The United States is Japan's largest supplier of consumer-oriented foods and second largest of edible fishery products. China is the largest fishery exporter to Japan and second largest for consumer oriented foods.

Figure B-3			
Tariff Rates* for Primary Consumer Food Imports			
HS Code(s)		Tariff Rate % (ad valorem)	Rank as Japanese Import (2000)**
0201.00	Beef	38.5	3
0202.00	Pork	(a)	10
0207.13	Chicken	8-12	7
0406.00	Cheese	22-30	14
0406.00	Processed cheese	40	14
0710.00	Frozen potatoes	8	19
1806.901003	Chocolate confectionery	10	29
2002.10	Prepared tomatoes	9-13	26
2204.21020	Wine	15 (b)	8
2208.20	Brandy	(c)	21
2208.30	Whisky	10-11	17
2309.10	Pet food	Free	11
Source: Japan Customs			

- (a) Pork tariffs cannot be quantified because of a complicated “gate price” formulation. Check with your agent.
 (b) Wine 15% or 125 yen/liter whichever is less (min 67 yen/liter)
 (c) Brandy 110 yen/liter

Figure B-4			
Tariff Rates* for Primary Edible Fishery Products			
HS Code(s)		Tariff Rate % (ad valorem)	Rank as Japanese Import (2000)**
0302.11	Salmon - fresh, chilled, frozen	4	5
1604.11	Salmon - processed	10	5
0302.21	Flatfish - fresh, chilled, frozen	4	23
1604.20	Flatfish - processed	10	23
0302.3139	Tuna, skipjack, bonito - fresh, chilled, frozen	4	4
1604.14	Tuna, skipjack, bonito - processed	10	4
0303.80	Cod roe - fresh, chilled, frozen	4	12
1604.30	Cod roe - processed	6-10	12
0304.0956	Surimi	4	22
0306.14	Crab - fresh, chilled, frozen, boiled	4	6
1605.10	Crab - processed	5-10	6
0307.991213-4	Squid - fresh, chilled, frozen	3-5	15
1605.90	Squid - processed	7-11	15
0307.991316	Sea urchin - live, fresh, chilled, frozen	Free - 7	18
1605.90220	Sea urchin - processed	10	18
Source: Japan Customs			

- * Approximate range of 2001 tariff rates for top Japanese imports (Figure B-1) rated as A or B prospects for US opportunity to increase exports.
 Confirm exact rates with your agent or Japan's Ministry of Finance.
 ** Items' rank in Figure B-1 (Top 30 Japanese imports).

Appendix C: Japanese Retailers

Figure C-1: Top 10 Supermarkets (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Outlets	Location	Telephone/Fax URL	Address
1	Coop	19.9	2,445	Nationwide	Tel: 03-5778-8103 Fax: 03-5778-8104 www.co-op.or.jp/jccu/	3-29-8 Shibuya, Shibuya-ku, Tokyo 150-8913
2	Aeon*	7.1	372	Nationwide	Tel: 043-212-6000 Fax: 043-212-6849 www.aeongroup.net	1-5-1 Nakase, Mihama-ku, Chiba 261-8515
3	Daiei	6.5	314	Nationwide	Tel: 03-3433-3211 Fax: 03-5968-6732 www.daiei.co.jp	2-4-1 Shibakoen, Minato-ku, Tokyo 105-8514
4	Ito-Yokado	6.2	182	Nationwide	Tel: 03-3459-2111 Fax: 03-3459-6873 www.itoyokado.iyg.co.jp	4-1-4 Shiba-Koen, Minato-ku, Tokyo 105-8571
5	Uny	4.7	160	Chubu, Kanto	Tel: 0587-24-8111 Fax: 0587-24-8024 www.unyg.co.jp/uny	1 Amaike-Gotandacho, Inazawa City, Aichi Pref. 492-8680
6	Seiyu	3.7	204	Nationwide	Tel: 03-3598-7000 Fax: 03-3598-7763 www.seiyu.co.jp	2-1-1 Akabane, Kita-ku, Tokyo 115-0045
7	Life Corporation	2.6	190	Kinki, Kanto	Tel: 06-6815-2600 Fax: 06-6815-2685 www.lifecorp.co.jp	1-19-4 Higashi-Nakajima, Higashi-Yodogawaku, Osaka 533-8558
8	Maruetsu	2.5	190	Kanto	Tel: 03-3590-1110 Fax: 03-3590-4642 www.maruetsu.co.jp	5-51-12 Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8401
9	Izumiya	1.7	79	Kinki	Tel: 06-6657-3310 Fax: 06-6657-3398 www.izumiya.co.jp	1-4-4 Hanazono-Minami, Nishinari-ku, Osaka 557-0015
10	Tokyu Store Chain	1.5	93	Kanto, Chubu	Tel: 03-3711-0109 Fax: 03-3791-6521 www.tokyu-store.co.jp	1-21-12 Kami-Meguro, Meguro-ku, Tokyo 153-8577

- Mycal Corp. ranked 7th for food sales during year 2000, declared bankruptcy on Sept. 14th 2001.

* AEON formerly JUSCO

Note: All food sales shown in Appendixes C, D, and E have been taken from company annual reports, Toyo Keizai or Nihon Keizai Shimbun and are in US dollars which have been converted from Japanese yen at the average year 2000 exchange rate (107.8 yen/dollar).

Figure C-2: Top Supermarkets by Region (2000)

Hokkaido			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
Coop Sapporo	Nichiryu	1.0	123
Ralse	Ralse Co. Ltd.	0.7	88
Ito-Yokado	Ito-Yokado	0.5	16
Mycal Hokkaido	Mycal Corp.	0.5	19
Maxvalu Hokkaido	Aeon	0.3	26

Tohoku

Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
York Benimaru	Ito-Yokado	1.8	91
Aeon	Aeon	0.8	58
Miyagi Coop	Coop	0.7	98
Maxvalu Tohoku	Aeon	0.5	76
Yamazawa	Nichiryu	0.5	60

Kanto			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores

Ito-Yokado	Ito-Yokado	4.0	117
Coop	Coop	3.0	365
Seiyu	Saison Group	2.7	147
Maruetsu/Daiei	Daiei	2.5	186
Kasumi	Nichiryu	2.1	95

Kinki			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
Coop Kobe	Nichiryu	2.2	267
Daiei	Daiei	2.0	97
Aeon	Aeon	1.8	93
Izumiya	Sun Investments	1.7	79
Life	Nichiryu	1.4	104

Chugoku			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
Izumi	Nichiryu	1.2	63
Tenmaya	Maruta Sangyo	0.5	65
Sanyo Marunaka	Marunaka	0.6	53
Marukyu	Marukyu	0.4	52
Yours	Yours	0.3	54

Chubu			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
Uny	Uny	3.6	123
Aeon	Aeon	2.6	139

U Store	Uny	0.9	62
Yamanaka	Yamanaka	1.0	65
Maxvalu Chubu	Aeon	0.5	65

Shikoku			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
Marunaka	Marunaka	1.0	96
Fuji	Asty Inc.	1.0	49
Sunny Mart	Nichiryu	0.4	25
Maruyoshi Center	Maruyoshi	0.3	42

Kyushu & Okinawa			
Company Name	Parent Company	Food Sales (\$ Billion)	No. of Stores
Kotobukiya	Lalala Group	1.4	126
Taiyo	Taiyo	0.8	85
Marushoku	Marushoku	0.8	103
Town Plaza Kanehide	Kanehide Inc	0.3	52
Super Daiei	Daiei	0.3	27

Figure C-3: Top 10 Department Stores (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Outlets	Location	Telephone/Fax URL	Address
1	Takashimaya	2.1	19	Nationwide	Tel: 06-6631-1101 Fax: 06-6632-9129 www.takashimaya.co.jp	5-1-5 Namba, Chuo-ku, Osaka 542-8510
2	Mitsukoshi	1.6	16	Nationwide	Tel: 03-3241-3311 Fax: 03-3242-4559 www.mitsukoshi.co.jp	1-4-1 Nihonbashi-Muromachi, Chuo-ku, Tokyo 103-8001
3	Seibu	1.0	25	Nationwide	Tel: 03-3989-0111 Fax: 03- www.seibu.co.jp	1-16-15 Minami-Ikebukuro Toshima-ku, Tokyo 171-8530
4	Kintetsu	0.8	9	Kinki	Tel: 06-6624-1111 Fax: 06-6622-8656 www.d-kintetsu.co.jp	1-1-43 Abenosuji, Abeno-ku Osaka 545-8545
5	Daimaru	0.8	10	Nationwide	Tel: 06-6271-1231 Fax: 06-6245-1343 www.daimaru.co.jp	1-7-1 Shinsaibashi-Suji, Chuo-ku, Osaka 542-8501
6	Isetan	0.8	7	Kanto	Tel: 03-3567-1211 Fax: 03-5550-9639 www.isetan.co.jp	3-6-1 Ginza, Chuo-ku, Tokyo 104-8130
7	Hankyu	0.8	11	Kinki, Kanto	Tel: 06-6361-1381 Fax: 06-6367-2943 www.hankyu-dept.co.jp	8-7 Kakuta-cho, Kita-ku Osaka 530-8350
8	Matsuzakaya	0.7	10	Nationwide	Tel: 052-251-1111 Fax: 052-264-7140 www.matsuzakaya.co.jp	3-16-1 Sakae, Naka-ku, Nagoya 460-8430
9	Tokyu	0.6	14	Kanto	Tel: 03-3477-3111 Fax: 03-3496-7200 www.tokyu-depart.co.jp	2-24-1 Dogenzaka, Shibuya-ku Tokyo 150-8019
10	Marui	0.3	45	Kanto	Tel: 03-3384-0101 Fax: 03-5343-6615 www.0101.co.jp	4-3-2 Nakano, Nakano-ku Tokyo 164-8701

Figure C-4: Top 10 Convenience Stores (2000)

Rank	Store Name (Parent)	Total Sales (\$ Bil)	No. of Outlets	Location	Telephone/Fax URL	Address
1	Seven-Eleven (Ito-Yokado)	19.6	8,602	Nationwide	Tel: 03-3459-3711 Fax: 03-3459-6609 www.sei.co.jp	4-1-4 Shibakoen, Minato-ku, Tokyo 105-0011
2	Lawson (Mitsubishi)	11.8	7,683	Nationwide	Tel: 03-5476-6800 Fax: 03-5440-7621 www.lawson.co.jp	4-9-25 Shibaura, Minato-ku, Tokyo 108-8563
3	Family Mart (Itochu)	7.8	5,825	Nationwide	Tel: 03-3989-6600 Fax: 03-5396-1810 www.family.co.jp	4-26-10 Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8404
4	Sunkus (Uny)	4.6	2,899	Nationwide	Tel: 03-5445-3451 Fax: 03-5445-3466 www.sunkus.co.jp	2-28-2 Shiba, Minato-ku, Tokyo 105-8539
5	Circle-K (Uny)	4.2	2,472	Kanto, Chubu, Kinki	Tel: 0587-24-9500 Fax: 0587-24-9503 www.circlek.co.jp	1 Gotanda-Cho, Amaiike, Inazawa-shi, Aichi 492-8685
6	Daily Yamazaki (Yamazaki)	3.1	2,407	Nationwide	Tel: 047-323-0001 Fax: 047-324-0082 www.daily-yamazaki.co.jp	Sun Plaza 35 Bldg., 1-9-2 Ichikawa, Ichikawa-shi, Chiba 272-8530
7	AM/PM (Japan Enaji)	2.2	1,304	Nationwide	Tel: 03-5211-3600 Fax: 03-5211-3593 www.ampm.co.jp	13 Ichibancho, Chiyoda-ku Tokyo 102-0082
8	Seicomart (independnt)	1.4	1,084	Hokkaido	Tel: 011-511-2796 Fax: 011-511-2834 www.seicomart.co.jp	Park 9-5 Bldg., Nishi 6, Minami 9, Chuo-ku, Sapporo 064-8620
9	Community Store (Kokubu)	0.6	668	Hokkaido, Kanto, Kinki	Tel: 03-5970-8050 Fax: 03-5970-8061 www.c-store.co.jp	1-6-22 Funado, Itabashi-ku, Tokyo 174-8561

10	Mini-Stop (AEON)	0.4	1,350	Kanto, Tokai, Kinki	Tel: 03-3294-9749 Fax: 03-3294-9791 www.ministop.co.jp	1-1 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
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Figure C-5: Top 10 Retail Food Wholesalers (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Sales Offices	Location	Telephone/Fax URL	Address
1	Kokubu	9.5	64	Nationwide	Tel: 03-3276-4000 Fax: 03-3275-1199 www.kokubu.co.jp	1-1-1 Nihonbashi, Chuo-ku, Tokyo 103-8241
2	Snow Brand Access	6.5	70	Nationwide	Tel: 03-3410-4372 Fax: 03-3410-4626 www.yuki-access.co.jp	3-1-1 Nozawa, Setagaya-ku, Tokyo 154-8501
3	Ryoshoku	5.6	29	Nationwide	Tel: 03-3767-5111 Fax: 03-3767-0424 www.ryoshoku.co.jp	Tokyo Ryutsu Center Bldg. 6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
4	Itochu Food	4.5	120	Nationwide	Tel: 06-6204-5901 Fax: 06-6204-5970 ad.disc.co.jp/itochu-shokuhin	2-1-6 Koraibashi, Chuo-ku, Osaka 541-8578
5	Meidi-ya	4.5	18	Nationwide	Tel: 03-3271-1111 Fax: 03-3273-6360 www.meidi-ya.co.jp	2-2-8 Kyobashi, Chuo-ku, Tokyo 104-0031
6	Kato Sangyo	3.6	32	Nationwide	Tel: 0798-337-650 Fax: 0798-225-637 www.katosangyo.co.jp	9-20 Matsubaramachi, Nishimiya, Hyogo 662-8543
7	Nihon Shurui Hanbai	3.6	46	Nationwide	Tel: 03-3273-1751 Fax: 03-3242-0457 www.nishuhan.co.jp	2-2-1 Yaesu, Chuo-ku, Tokyo 104-0028
8	Asahi Shokuhin	2.9	47	Nationwide	Tel: 088-882-7111 Fax: 088-882-7130 www.infor-yoma.or.jp/asahi	2-15-5 Minami Harimayacho Kochi 780-8505
9	Yamae Hisano	2.1	16	Nationwide	Tel: 092-474-0711 Fax: 092-415-3314 www.yamaehisano.co.jp	2-13-34 Hakata Eki Higashi, Hakata-ku, Fukuoka 812-8548
10	Nishino Shoji	2.0	13	Nationwide	Tel: 03-3843-0291 Fax: 03-3843-0235 www.nishino.co.jp	5-2-2 Higashi Ueno, Taito-ku, Tokyo 110-8624

Appendix D: Japanese Food Service Companies

Figure D-1: Top 10 Commercial Restaurant Food Service Companies (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Outlets	Location	Telephone/Fax URL	Address
1	McDonald's Japan	4.0	3,598	Nationwide	Tel: 03-3344-6251 Fax: 03-3344-6872 www.mcdonalds.co.jp	6-5-1 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1339
2	Skylark	3.1	2,266	Nationwide	Tel: 0422-51-8111 Fax: 0422-37-5240 www.skylark.co.jp	1-25-8 Nishi-Kubo, Musashino-shi, Tokyo 180-8580
3	Duskin (Mister Donut)	1.3	1,291	Nationwide	Tel: 06-6821-5222 Fax: 06-6821-5334 www.duskin.co.jp	1-33 Toyosu-cho, Suita-shi, Osaka 564-0051
4	Kentucky Fried Chicken Japan	1.3	1,435	Nationwide	Tel: 03-3719-0231 Fax: 03-5722-7247 japan.kfc.co.jp	1-15-1 Ebisu-Minami, Shibuya-ku, Tokyo 150-8586
5	Royal (Royal Host)	1.2	551	Nationwide	Tel: 092-471-2414 Fax: 092-471-2508 www.royal.co.jp	3-28-5 Naka, Hakata-ku, Fukuoka 816-8584
6	Monterozza (Shirokiya)	1.2	953	Nationwide	Tel: 0422-36-8888 Fax: 0422-36-8988 www.monterozza.co.jp	1-17-3 Nakamachi, Musashino-shi, Tokyo 180-8538
7	Mos Food Services	1.2	1,570	Nationwide	Tel: 03-3266-7171 Fax: 03-3266-7110 www.mos.co.jp	22, Tansu-machi, Shinjuku-ku, Tokyo 162-8501
8	Denny's Japan	0.9	536	Kanto, Tokai	Tel: 03-3459-3501 Fax: 03-3459-3558 www.dennys.co.jp	4-1-4 Shiba-koen, Minato-ku, Tokyo 105-8571
9	Yoshinoya D&C	0.9	735	Nationwide	Tel: 03-5269-5111 Fax: 03-5269-5078 www.yoshinoya-dc.com	4-3-17 Shinjuku, Shinjuku-ku, Tokyo 160-8451
10	Seiyo Food Systems	0.8	729	Nationwide	Tel: 03-3984-0281 Fax: 03-3983-3475 www.seiyofood.co.jp	3-1-1 Higashi Ikebukuro, Toshima-ku, Tokyo 170-6066

Figure D-2: Top 10 Hotel/Resort Food Service Companies (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Hotels	Location	Telephone/Fax URL	Address
1	Prince Hotels	0.6	54	Nationwide	Tel: 03-3498-1111 Fax: 03-3498-1113 www.princehotels.co.jp	6-35-1 Jingumae, Shibuya-ku, Tokyo
2	Imperial Hotel	0.3	3	Tokyo, Osaka, Kamikochi	Tel: 03-3504-1111 Fax: 03-3539-8148 www.imperialhotel.co.jp	1-1-1 Uchi-Sawaicho, Chiyoda-ku, Tokyo 100-8558
3	Hotel New Otani	0.3	25	Nationwide	Tel: 03-3265-1111 Fax: 03-3221-2619 www.newotani.co.jp	4-1 Kioicho, Chiyoda-ku, Tokyo 102-8578
4	Fujita Kanko	0.3	27	Nationwide	Tel: 03-3433-5154 Fax: 03-3433-5197 www.fujita-kanko.co.jp	1-9-15 Kaigan, Minato-ku, Tokyo 105-8551
5	Keio Plaza Hotel	0.2	4	Tokyo, Sapporo	Tel: 03-3344-0111 Fax: 03-3345-8269 www.keioplaza.co.jp	2-2-1 Nishi Shinjuku, Shinjuku-ku, Tokyo 160-8330
6	Tokyu Hotel Chain	0.2	17	Nationwide	Tel: 03-3264-0111 Fax: 03-3264-2788 www.tokyuhotel.co.jp	6-6 Kojimachi, Chiyoda-ku, Tokyo 102-0083
7	Hotel Okura	0.2	13	Nationwide	Tel: 03-3582-0111 Fax: 03-3582-3707 www.okura.com	2-10-4 Toranomon, Minato-ku, Tokyo 105-0001
8	Washington Hotel	0.2	71	Nationwide	Tel: 052-972-8080 Fax: 052-972-6246 www.washingtonhotel.co.jp	3-12-29 Nishiki, Naka-ku, Nagoya 460-0003

9	Tokyu Inn	0.2	45	Nationwide	Tel: 03-3477-0109 Fax: 03-3477-6109 www.tokyu.co.jp/inn	5-6 Minami Hiradaimachi, Shibuya-ku, Tokyo
10	Hotel New Hankyu	0.1	6	Osaka, Kyoto, Tokyo, Kochi	Tel: 06-6372-5101 Fax: 06-6375-1698 hotel.newhankyu.co.jp	1-1-35 Shibata, Kita-ku, Osaka 530-8310

Figure D-3: Top 10 Institutional Food Service Companies (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Offices	Location	Telephone/Fax URL	Address
1	Nisshin Iryo	1.5	2,619	Nationwide	Tel: 03-3230-2235 Fax: 03-3237-4922 www.nifs.co.jp	Kioicho Bldg. 16F, 3-12 Kioicho, Chiyoda-ku, Tokyo 102-0094
2	Shidax Food Service	0.6	2,400	Nationwide	Tel: 03-5908-1341 Fax: 03-5323-5620 www.shidax.co.jp	3-7-1 Nishi-Shinjuku Shinjuku-ku, Tokyo 163-1036
3	Aim Service	0.6	780	Nationwide	Tel: 03-3502-3721 Fax: 03-3502-6580 www.aim-services.co.jp	1-1-15 Nishi-Shimbashi, Minato-ku, Tokyo 105-0003
4	Green House	0.4	1,000	Nationwide	Tel: 03-3379-1211 Fax: 03-3370-9280 www.greenhouse.co.jp	3-20-2 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1477
5	Nippon Restaurant Enterprise	0.4	300	Nationwide	Tel: 03-5798-8070 Fax: 03-5798-8071 www.nre.co.jp	2-19-13 Takanawa, Minato-ku, Tokyo 108-0074
6	Mephos	0.3	35	Nationwide	Tel: 03-3262-6262 Fax: 03-3262-0108 www.mefos.co.jp	1 Gobancho, Chiyoda-ku, Tokyo 102-0076
7	Uokuni Sohonsa	0.3	309	Nationwide	Tel: 06-6478-5700 Fax: 06-6478-5702 www.uokuni-sohonsa.co.jp	4-1-28 Takeshima, Nishi Yodogawa-ku, Osaka 555-0011
8	Nikkoku Trust	0.3	800	Nationwide	Tel: 03-3211-4451 Fax: 03-3211-4455 No web site	1-6-1 Otemachi, Chiyoda-ku, Tokyo 100-0004
9	Fuji Sangyo	0.3	30	Nationwide	Tel: 03-5400-6113 Fax: 03-5400-6114 www.fuji-i.com	F1 Bldg, 5-32-7 Shimbashi, Minato-ku, Tokyo 105-0004
10	Ichifuji Food Service	0.3	1,100	Nationwide	Tel: 06-6458-8801 Fax: 06- www.ifsco-group.com	4-7-2 Fukushima, Fukushima-ku, Osaka 553-0003

Figure D-4: Top 10 Food Service Wholesalers (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Sales Offices	Location	Telephone/Fax URL	Address
1	Kokubu	9.5	64	Nationwide	Tel: 03-3276-4000 Fax: 03-3275-1199 www.kokubu.co.jp	1-1-1 Nihonbashi, Chuo-ku, Tokyo 103-8241
2	Snow Brand Access	6.5	70	Nationwide	Tel: 03-3410-4372 Fax: 03-3410-4626 www.yuki-access.co.jp	3-1-1 Nozawa, Setagaya-ku, Tokyo 154-8501
3	Ryoshoku	5.6	29	Nationwide	Tel: 03-3767-5111 Fax: 03-3767-0424 www.ryoshoku.co.jp	6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
4	Itochu Foods	4.5	120	Nationwide	Tel: 06-6204-5901 Fax: 06-6204-5970 ad.disc.co.jp/itochu-shokuhin	2-1-6 Koraibashi, Chuo-ku, Osaka 541-8578
5	Sanyukoami	2.93*	90	Nationwide	Tel: 03-3551-1412 Fax: 03-3551-2290 Takamasa.Hanawa@sanyu-koami.co.jp	1-22-15 Shinkawa, Chuo-ku, Tokyo 104-8286
6	Nacx Nakamura	1.4	19	Nationwide	Tel: 078-360-5598 Fax: 078-360-5545 www.nacx.co.jp	1-7-4 Higashi Kawasaki, Chuo-ku, Kobe 650-0044
7	Takase Bussan	0.8	59	Nationwide	Tel: 03-3545-7530 Fax: 03-3545-7533 www.takasebussan.co.jp	2-1-8 Tsukiji, Chuo-ku, Tokyo 104-0045
8	Yaguchi	0.5	10	Nationwide	Tel: 03-3452-7532 Fax: 03-3451-1316 www.yaguchi.net	2-1-21 Kaigan, Minato-ku, Tokyo 105-0022
9	Oie Sangyo	0.4	49	Nationwide	Tel: 06-6375-0152 Fax: 06-6374-6853 www.oie.co.jp	6-18-1 Togoshi, Kita-ku, Osaka 531-8534
10	Sato Shokai	0.4	4	Tohoku	Tel: 022-236-5600 Fax: 022-236-4630 www.satoh-web.co.jp	5-6-22 Ogimachi, Miyagino-ku, Sendai, Miyagi Pref. 983-8556

* Sales for July-December period due to the merger of both companies; Sanyu and Koami.

Figure D-5: Top 5 Bento Producers/Marketers (2000)

Rank	Company Name	Food Sales (\$ Bil)	No. of Sales Offices	Location	Telephone/Fax URL	Address
1	Hokkahokkatei Sohonbu	1.6	3,744	Nationwide	Tel:045-314-7481 Fax:045-314-9628 www.hokkahokkatei-riz.co.jp	2-15-10 Kitasawa, Nishi-ku, Yokohama, Kanagawa 220-0004
2	Honke Kamadoya	1.2	2,650	Nationwide	Tel: 078-251-3050 Fax: 078-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097
3	Origin Toshu	0.2	279	Nationwide	Tel: 03-3305-0180 Fax:03-3305-0330 www.toshu.co.jp	3-2-4 Sengawacho, Chofu, Tokyo 182-0002
4	Hirai	0.1	77	Kyushu	Tel: 096-324-3666 Fax: 096-326-4115 www.hirai-wa.com	7-26-70 Kasugacho, Kumamoto 860-0047
5	Human Life	0.1	197	Aichi	Tel: 052-522-6166 Fax: 052-522-6197 www.bentoman.co.jp	6-60-1 Konomicho, Nishi-ku, Nagoya 451-0015

Appendix E: Japanese Food Manufacturers

Fig E-1		
Broad-line		
Company Name	Food Sales (\$ Bil)	Main Product
Ajinomoto	8.4	Seasonings
Kikkoman	3.1	Soy Sauce
House Foods	1.9	Curry & Spices
Showa Sangyo	1.7	Flour & Frozen Foods
Kagome	1.3	Processed Tomato Products

Company Name	Food Sales (\$ Bil)	Main Products
Ajinomoto	8.4	Fried Rice & Vegetables
Nichirei	4.3	Fried Rice & Vegetables
Katokichi	2.0	Fried Shrimp
Nippon Suisan	4.3	Seafood
Yokohama Reito	0.6	Seafood

Fig E-3		
Meat Processors		
Company Name	Food Sales (\$ Bil)	Main Products
Nippon Ham	8.6	Meat
Ito Ham	4.4	Ham, Sausages & Fresh Meat
Marudai Food	2.2	Ham & Sausages
Prima Ham	2.6	Meat
Snow Brand Foods	0.9	Meat Products

Fig E-4		
Dairy Products		
Company Name	Food Sales (\$ Bil)	Main Product
Snow Brand Milk	9.7	General Dairy
Meiji Milk	5.7	Dehydrated Milk
Morinaga Milk	4.8	Milk & Yogurt
Yotsuba	1.0	Milk
Rokko Butter	0.3	Cheese

Fig E-5		
Seafood		
Company Name	Food Sales (\$ Bil)	Main Product
Maruha	8.3	Chilled Foods and Surimi
Nippon Suisan	4.3	Frozen Foods and Surimi
Nichiro	2.2	Salmon, Crab and Surimi
Kyokuyo	1.6	Processed Foods
Hoko Fishing	0.6	Microwavable Foods

Fig E-6		
Baking		
Company Name	Food Sales (\$ Bil)	Main Product
Yamazaki Pan	6.3	Bread & Cakes
Shikishima Baking	1.3	Bread & Cakes
First Baking	0.6	Cakes
Takarabune	0.3	Cream Puffs
Ito Pan	0.1	Bread

Fig E-2		
Frozen Foods		

Fig E-7		
Edible Oil		

Company Name	Food Sales (\$ Bil)	Main Product
Fuji Oil	1.3	Palm & Coconut Oil
Nisshin Oil Mills	1.2	Cooking Oil
Honen	0.8	Cooking Oil
Yoshihara Oil Mills	0.3	Cooking Oil

Company Name	Food Sales (\$ Bil)	Main Product
Nisshin Seifun	3.4	Flour
Toyo Suisan	3.0	Instant Noodles
Nissin Food	2.8	Instant Noodles
Nippon Flour	1.7	Flour
Nitto Flour	0.3	Flour

Fig E-9 Confectionery		
Company Name	Food Sales (\$ Bil)	Main Product
Ezaki Glico	2.5	Chocolates
Meiji Seika	2.2	Chocolates
Morinaga	1.8	Chocolates
Fujiya	0.9	Candies
Bourbon	0.8	Cookies & Biscuits

Fig E-10 Sauces and Condiments		
Company Name	Food Sales (\$ Bil)	Main Product
Ajinomoto	8.4	Seasonings
Q.P.	3.6	Mayonnaise
Kikkoman	3.1	Soy Sauce
House Foods	1.9	Curry & Spices
S&B Foods	1.0	Spices & Herbs

Fig E-11 Alcoholic Beverages		
Company Name	Food Sales (\$ Bil)	Main Product
Asahi Breweries	10.5	Beer
Kirin Breweries	10.3	Beer
Suntory	5.2	Spirits, Wine, Beer
Sapporo Breweries	4.6	Beer
Takara Shuzo	1.4	Shochu

Fig E-12 Non-Alcoholic Beverages		
Company Name	Food Sales (\$ Bil)	Main Product
Coca Cola	6.4	Non-alcoholic Beverages
Suntory	3.7	Non-alcoholic Beverages
Kirin Beverage	2.7	Tea, Coffee, Green Tea
Asahi Soft Drinks	2.0	Green Tea, Coffee
Ito-en	1.8	Green Tea

Appendix E Sources: Company annual reports, Toyo Keizai and Nikkei

Fig E-8 Flour and Noodle

Appendix F: Key Contacts

Figure F-1: US Government

Organization Name	Telephone/Fax URL	Address
Agricultural Trade Office American Embassy, Tokyo	Tel: 03-3505-6050 Fax: 03-3582-6429 www.atojapan.org atotokyo@fas.usda.gov	Toshin Tameike Bldg 8F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Agricultural Trade Office American Consulate- General, Osaka	Tel: 06-6315-5904 Fax: 06-6315-5905 www.atojapan.org atoosaka@fas.usda.gov	2-11-5 Nishitenma Osaka 530-0047
Agricultural Affairs Office, American Embassy, Tokyo	Tel: 03-3224-5101 Fax: 03-3589-0793 agtokyo@fas.usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
American Embassy Tokyo, Japan	Tel: 03-3224-5000 Fax: 03-5570-5041 usembassy.state.gov/tokyo/	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Animal and Plant Health Inspection Service (APHIS)	Tel: 03-3224-5111 Fax: 03-3224-5291 www.aphis.usda.gov	1-10-5 Akasaka, Minato-ku, Tokyo 107-8420
FAS Washington	www.fas.usda.gov	1400 Independence Ave., SW Washington, DC 20250
USDA Washington	www.usda.gov	1400 Independence Ave., SW Washington, DC 20250

Figure F-2: US State Government Offices in Japan

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 03-5232-3851 Fax: 03-5232-3850 www.ado.state.al.us	Aoki Bldg. 8F, 5-32-8 Shiba Minato-ku, Tokyo 108-0014
Alaska	Tel: 03-3556-9621 Fax: 03-3556-9623 www.alaska.or.jp	Room 307 Central Bldg. 22-1, Ichibancho Chiyoda-ku, Tokyo 102-0082
Arizona	Tel: 03-5421-0845 Fax: 03-5421-0845 www.az.gov	AIOS Hiroo Bldg. 5F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Arkansas	Tel: 03-5447-7471 Fax: 03-5447-7472 www.1-800-arkansas.com	AIOS Hiroo Bldg. 8F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
California	Tel: 03-3583-3140 Fax: 03-3584-6613 www.california.or.jp	Kowa 35th Bldg. 1-14-15, Akasaka Minato-ku, Tokyo 107-0052
Colorado	Tel: 03-5272-1041 Fax: 03-3207-6685 www.colorado.japan.org	Kowa 35th Bldg. 1-14-15, Akasaka Minato-ku, Tokyo 107-0052
Delaware	Tel: 03-3345-7600 Fax: 03-3347-8180 www.state.de.us	2-6-1 Nishi-Shinjuku Shinjuku-ku, Tokyo 163-0269
Florida	Tel: 03-3230-1821 Fax: 03-5213-8169 www.floridabusiness.co.jp	3-1-1 Kojimachi Chiyoda-ku, Tokyo 102-0083
Georgia	Tel: 03-3459-8250 Fax: 03-3459-8247 www.georgia.org	2-12-7 Higashi-Shimbashi Minato-ku, Tokyo 105-0021
Illinois	Tel: 03-3268-8011 Fax: 03-3268-8700 www.commerce.state.il.us	2-1 Ichigaya, Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Indiana	Tel: 045-228-0625 Fax: 045-211-1192 www.venture-web.or.jp/indiana/	1-1 Sakuragicho Naka-ku, Yokohama 231-0062
Iowa	Tel: 03-3222-6901 Fax: 03-3222-6902 www.smart.state.ia.us	Room 903 Central Bldg, 22-1 Ichibancho Chiyoda-ku, Tokyo 102-0082
Kansas	Tel: 03-3239-2844 Fax: 03-3239-2848 www.kansascommerce.com	Kioicho WITH Bldg 4F, 3-32 Kioicho Chiyoda-ku, Tokyo 102-0094
Kentucky	Tel: 03-3582-2334 Fax: 03-3588-1298 www.kentucky-net.com	2-5-8 Akasaka Minato-ku, Tokyo 107-0052
Michigan	Tel: 045-290-3650 Fax: 045-290-3605 www.michigan.org	1-2-20 Hiranuma Nishi-ku, Yokohama, Kanagawa 220-0023
Minnesota	Tel: 03-5434-3991 Fax: 03-5740-6433 www.dted.state.mn.us	7-3-16 Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031

Mississippi	Tel: 045-222-2047 Fax: 045-222-2048 www.mississippi.org	Yokohama World Porters 6F, 2-2-1 Shinko Naka-ku, Yokohama 231-0001
Missouri	Tel: 03-3586-1496 Fax: 03-3586-1498 www.ecodev.state.us.mo	Akasaka Hillside Bldg. 1F, 2-18-1 Akasaka Minato-ku, Tokyo 107-0052
New Jersey	Tel: 03-3213-5330 Fax: 03-3213-5336 www.state.nj.us	Kokusai Bldg. Suite 238, 3-1-1 Marunouchi Chiyoda-ku, Tokyo 100-0005
New York	Tel: 03-3503-5196 Fax: 03-3509-1020 www.empire.state.ny.us	Mori Bldg 6F, 2-6-4 Toranomon Minato-ku, Tokyo 105-0001
North Carolina	Tel: 03-3435-9301 Fax: 03-3435-9303 www.commerce.state.nc.us	Suzuki Bldg 5F, 3-20-4 Toranomon Minato-ku, Tokyo 105-0001
Ohio	Tel: 03-3262-1312 Fax: 03-3239-6477 www.state.oh.us	Hirakawacho Bldg 7F, 2-6-1 Hirakawacho Chiyoda-ku, Tokyo 102-0093
Oregon	Tel: 03-3580-8951 Fax: 03-3580-9071 www.state.or.us	Shimbashi Hara Bldg. 3F, 2-10-5 Shimbashi Minato-ku, Tokyo 105-0004
Pennsylvania	Tel: 03-3505-5107 Fax: 03-5549-4127 www.pa-japan.org	KY Bldg 7F, 3-16-14, Roppongi Minato-ku, Tokyo 106-0032
South Carolina	Tel: 03-5408-5461 Fax: 03-5408-5462 www.myscgv.com	Annex 2-Gokan 5F, 3-8-27 Toranomon Minato-ku, Tokyo 105-0001
Tennessee	Tel: 045-222-2041 Fax: 045-222-2043 www.state.tn.us	Yokohama World Porters 6F, 11 Shinko-cho Naka-ku, Yokohama 231-0001
Texas	Tel: 03-3400-1352 Fax: 03-6418-0570 www.state.tx.us	2-5-9 Hiroo Shibuya-ku, Tokyo 150-0012
Virginia	Tel: 03-3539-3661 Fax: 03-3539-3669 www.yesvirginia.org	Imperial Tower 8F, 1-1-1 Uchisaiwaicho Chiyoda-ku, Tokyo 100-0011
Washington	Tel: 03-3459-0896 Fax: 03-3459-0897 www.trade.wa.gov	5-4-8-301 Toranomon Minato-ku, Tokyo 105-0001
West Virginia	Tel: 052-953-9798 Fax: 052-953-9795 www.wv-jp.net	3-24-17 Nishiki Naka-ku, Nagoya 460-0003

Figure F-3: US Trade Associations and Cooperator Groups in Japan

Organization Name	Telephone/Fax URL	Address
Alaska Seafood Marketing Institute	Tel: 03-3990-1767 Fax: 03-3990-4725 www.alaskaseafood.org	5-31-2-410 Kasugacho Nerima-ku, Tokyo 179-0074
Almond Board of California	Tel: 03-3486-6841 Fax: 03-3486-7531 www.almond.org	2-12-19 Shibuya Shibuya-ku, Tokyo 150-8343
American Forest & Paper Association	Tel: 03-3583-2850 Fax: 03-3589-1560 www.afandpa.org	Toshin Tameike Bldg.8F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
American Hardwood Export Council	Tel: 06-6315-5101 Fax: 06-6315-5103 www.ahec.org	c/o American Consulate-General 10F 2-11-5 Nishitenma, Kita-ku, Osaka 530-8543
American Seafood Institute	Tel: 03-3577-8600 Fax: 03-3990-4725 (n.a.)	5-31-2-410 Kasugacho Nerima-ku, Tokyo 179-0074
American Softwood Japan Office	Tel: 03-3589-1320 Fax: 03-3589-1560 www.softwood.org / www.sspa.org	Toshin Tameike Bldg.8F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
American Soybean Association	Tel: 03-5563-1414 Fax: 03-5563-1415 www.amsoy.org	Toshin Tameike Bldg.7F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
APA - The Engineered Wood Association	Tel: 03-3589-0127 Fax: 03-3589-1560 www.apawood.org	Toshin Tameike Bldg.8F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Asparagus, USA	Tel: 03-5413-6263 Fax: 03-5413-7321 www.calasparagus.com	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Blue Diamond Growers	Tel: 03-3506-8877 Fax: 03-3506-8883 www.bluediamond.com	Toranomon NS Bldg, 1-22-15 Toranomon Minato-ku, Tokyo 105-0001
California Cherry Advisory Board	Tel: 045-641-3111 Fax: 045-663-1646 www.calcherry.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
California Fig Advisory Board	Tel: 03-5413-6263 Fax: 03-5413-7321 www.californiafigs.com	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
California Nectarine & Fresh Prune Commission	Tel: 045-641-3111 Fax: 045-663-1646 www.caltreefruit.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005

California Pistachio Commission	Tel: 03-5413-6263 Fax: 03-5413-7321 www.pistachio.org.com	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
California Prune Board	Tel: 03-3584-0866 Fax: 03-3505-6353 www.prunes.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Strawberry Commission	Tel: 03-3588-1454 Fax: 03-3505-6353 www.calstrawberry.com	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Table Grape Commission	Tel: 045-641-3111 Fax: 045-663-1646 www.tablegrape.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
California Tomato Commission	Tel: 045-641-3111 Fax: 045-663-1646 www.tomato.org	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
California Walnut Commission	Tel: 03-5561-0401 Fax: 03-5562-9710 www.walnuts.org	Akasaka TM Flat #201, 7-3-16 Akasaka Minato-ku, Tokyo 107-0052
Cranberry Marketing Committee	Tel: 045-641-3111 Fax: 045-663-1646 www.uscranberries.com	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
Dairy Export Council, US	Tel: 03-3505-5737 Fax: 03-3505-6353 www.usdec.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Dry Pea & Lentil Council, USA	Tel: 03-3288-0282 Fax: 03-3263-1720 www.pea-lentil.com	3-3-17 Kudan Minami Chiyoda-ku, Tokyo 102-0074
Florida Department of Citrus	Tel: 03-3584-7019 Fax: 03-3582-5076 www.floridajuice.com	Suite 310, 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Florida Tomato Committee	Tel: 045-641-3111 Fax: 045-663-1646 www.floridatomatoes.org	Koyo Bldg. 7F, 5-49 Honcho Naka-ku, Yokohama, Kanagawa 231-0005
Grains Council, US	Tel: 03-3505-0601 Fax: 03-3505-0670 www.grains.org	Toshin Tameike Bldg. 7F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Idaho Potato Commission	Tel: 03-3438-3361 Fax: 03-3438-3672 www.idahopotatoes.com	#2 Takachiho Bldg., 2F, 1-6-9 Shiba Daimon Minato-ku, Tokyo 105-0012
Meat Export Federation, US (Tokyo Office)	Tel: 03-3584-3911 Fax: 03-3587-0078 www.us.mef.org	Toshin Tameike Bldg. 7F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Meat Export Federation, US (Osaka Office)	Tel: 06-6315-5105 Fax: 06-6315-5103 www.us.mef.org	c/o American Consulate-General 10F 2-11-5 Nishitenma, Kita-ku, Osaka 530-8543
National Dry Bean Council	Tel: 03-3221-6410 Fax: 03-3221-5960 (n.a.)	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Northwest Cherry Growers	Tel: 03-5413-6263 Fax: 03-5413-7321 www.nwcherries.com	Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Northwest Wine Coalition	Tel: 03-5413-6263 Fax: 03-5413-7321 www.northwestwine.org	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Papaya Admin. Committee	Tel: 03-3888-4224 Fax: 03-3888-3643 www.planet-hawaii.com/papaya	Koyo Bldg, 11-8 Sekiyacho, Senju Adachi-ku, Tokyo 120-0024
Pet Food Institute	Tel: 03-3486-6841 Fax: 03-3486-7502 www.petfoodinstitute.org	TOTATE International Bldg, 2-12-19 Shibuya Shibuya-ku, Tokyo 150-8343
Potato Board, US	Tel: 03-3505-5737 Fax: 03-3505-6353 www.potatohelp.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Poultry and Egg Export Council, USA	Tel: 03-5354-7429 Fax: 03-5354-7099 www.usapeec.org	Shimomoto Bldg., 1-46-3 Hatsudai Shibuya-ku, Tokyo 151-0061
Raisin Administrative Committee	Tel: 03-3221-6410 Fax: 03-3221-5960 www.raisins.org	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Rice Federation, USA	Tel: 03-3505-5752 Fax: 03-3505-6353 www.usarice.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Sunkist Pacific Ltd.	Tel: 03-5210-9308 Fax: 03-5210-9306 www.sunkist.com	4F, 3-5-1 Kojimachi Chiyoda-ku, Tokyo 102-0083
Washington Apple Commission	Tel: 03-5413-6263 Fax: 03-5413-7321 www.bestapples.com/new	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Wheat Associates, US	Tel: 03-3582-7911 Fax: 03-3582-7915 www.uswheat.org	Toshin Tameike Bldg.5F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Wild Blueberry Association of North America	Tel: 03-3438-3361 Fax: 03-3438-3672 www.wildblueberries.com	#2 Takachiho Bldg 2F, 1-6-9 Shiba Daimon Minato-ku, Tokyo 105-0012
Wine Institute of California	Tel: 03-3707-8960 Fax: 03-3707-8961 www.wineinstitute.org	2-24-6-403 Tamagawa Setagaya-ku, Tokyo 158-0094

Figure F-4: US Laboratories Approved by the Japanese Government

Organization Name	Telephone/Fax URL	Address
Center for Analytical Chemistry, CA	Tel: 916-262-1434 Fax: 916-262-1572 134.186.235.98/inspection/cac/	3292 Meadowview Rd. Sacramento, CA 95832
Export Service Center, OR	Tel: 503-229-6557 Fax: 503-229-5933 www.oda.state.or.us	1200 NW Front Ave. Portland, OR 97209-2898
ABC Research Corporation	Tel: 904-372-0436 Fax: 904-378-6483 www.abcr.com	3437 SW 24 th Ave. Gainesville, FL 32602
Acts Testing Labs	Tel: 716-505-3300 Fax: 716-505-3301 www.mtl-acts.com	100 Northpoint Parkway Buffalo, NY 14228-1884
ANRESCO, Inc.	Tel: 415-822-1102 Fax: 415-822-6614 www.anresco.com	1370 Van Dyke Ave. San Francisco, CA 94124-3313
Bolin Laboratories, Inc.	Tel: 602-942-8220 Fax: 602-942-1050 (n.a.)	17631 N. 25 th Ave. Phoenix, AZ 85023
Cargill Analytical Services Laboratory	Tel: 417-451-5973 Fax: 417-451-5478 www.cargill.com	Crowder Industrial Park, 4301 Doniphane Dr. Neosho, MO 64850
Central Analytical Laboratories	Tel: 504-393-5290 Fax: 504-393-5270 www.centralanalytical.com	101 Woodland Hwy. Belle Chasse, LA 70037
C.L. Technology, Inc.	Tel: 909-734-9600 Fax: 909-734-2803 (n.a.)	280 N. Smith Ave. Corona, CA 91720
Columbia Food Laboratories, Inc.	Tel: 503-695-2287 Fax: 503-695-5187 www.columbiafoodlab.com	36740 E. Historic Columbia River Hwy. Corbett, OR 97019
Food Products Laboratory, Inc.	Tel: 503-253-9136 Fax: 503-253-9019 www.fplabs.com	12003 NE Ainsworth Cir., Suite 105 Portland, OR 97220-1099
Irvine Analytical Laboratories, Inc.	Tel: 714-951-4425 Fax: 714-951-4909 ialab.com	10 Vanderbilt Dr. Irvine, CA 92618
Midwest Research Institute	Tel: 816-753-7600 Fax: 816-753-8420 www.mrresearch.org	425 Volker Blvd. Kansas City, MO 64110
Michelson Laboratories	Tel: 310-928-0553 Fax: 310-927-6625 www.michelsonlab.com	6280 Chalet Dr. Commerce, CA 90040
The National Food Laboratory, Inc.	Tel: 510-828-1440 Fax: 510-833-8795 www.thenfl.com	6363 Clark Ave. Dublin, CA 94568-3097
OMIC USA, Inc.	Tel: 503-224-5929 Fax: 503-223-9436 www.omicusa.com	1200 NW Front Ave., Suite 100 Portland, OR 97209
Primus Laboratories	Tel: 805-922-0055 Fax: 805-922-2462 www.primuslabs.com	3130 Skyway Dr., Suite 308 Santa Maria, CA 93455
Silliker Laboratories of Illinois, Inc.	Tel: 708-756-3210 Fax: 708-756-2898 www.silliker.com	1304 Halsted St. Chicago Heights, IL 60411
West Coast Food Center	Tel: 503-254-5143 Fax: 503-254-1452 www.wcfc.com	12423 NE Whitaker Way Portland, OR 97230

Figure F-5: Japanese Government

Organization Name	Telephone/Fax URL	Address
Japan External Trade Organization (JETRO)	Tel:03-3582-5521, Fax: 03-3582-0504 www.jetro.go.jp	2-2-5 Toranomon Minato-ku, Tokyo 105-8466
Min. of Agriculture, Forestry and Fisheries	Tel: 03-3502-8111 www.maff.go.jp	1-2-1 Kasumigaseki Chiyoda-ku, Tokyo 100-0013
Ministry of Health, Labor and Welfare	Tel: 03-3503-1711 www.mhlw.go.jp	1-2-2 Kasumigaseki Chiyoda-ku, Tokyo 100-0013
Zen-noh (JA)	Tel: 03-3245-7854 Fax: 03-3245-7444 www.zennoh.or.jp	1-8-3 Otemachi Chiyoda-ku, Tokyo 100-004
JETRO Atlanta	Tel: 404-681-0713 Fax:404-681-0713 www.jetroatlanta.org	245 Peachtree Center Avenue, Suite 2208 Atlanta, GA30303
JETRO Chicago	Tel: 312-832-6000 Fax: 32-832-6066 www.jetrocgo.org	401 North Michigan Avenue, Suite 660 Chicago, IL. 60611
JETRO Denver	Tel: 303-629-0404 Fax: 303-893-9533 www.jetrodenver.org	1200 Seventeenth Street, Suite 1110 Denver, CO 80202
JETRO Houston	Tel: 713-759-9595 Fax: 713-759-9210 www.jetro.org/houston	1221 McKinney, Suite 2360 Houston, TX 77010
JETRO Houston Dallas Branch	Tel: 214-651-0839 Fax: 214-651-1831 (n.a.)	Suite 152-1, World Trade Center 2050 Stemmons Freeway Dallas, TX 75207
JETRO Los Angeles	Tel: 213-624-8855 Fax: 213-629-8127 www.jetro.org/losangeles	777 South Figueroa Street, Suite 4900 Loa Angeles, CA 90017
JETRO New York	Tel: 212-997-0400 Fax: 212-997-0464 www.jetro.org/newyork	1221 Avenue of the Americas, 42 nd Floor New York, NY 10020-1079
JETRO San Francisco	Tel:415-392-1333 Fax: 415-788-6927 www.jetro.org/sanfrancisco	235 Pine Street, Suite 1700 San Francisco, CA 94104

Figure F-6a: Japanese Associations - Food

Organization Name	Telephone/Fax URL	Address
All Japan Confectionery Assoc.	Tel: 03-3431-3115 Fax: 03-3432-1660 (n.a.)	5-14-3 Shimbashi Minato-ku, Tokyo 105-0004
All Japan Dry Noodle Assoc.	Tel: 03-3666-7900 Fax: 03-3669-7662 www.kanmen.com	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Japan Macaroni Assoc.	Tel: 03-3667-4245 Fax: 03-3667-4245 www.pasta.or.jp	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Japan Spices Assoc.	Tel: 03-3940-2791 Fax: 03-3940-2790 (n.a.)	2-13-1 Nishigahara Kita-ku, Tokyo 114-0024
Chocolate & Cocoa Assoc. of Japan	Tel: 03-5777-2035 Fax: 03-3432-8852 www.chocolate-cocoa.com	JB Bldg., 6-9-5 Shimbashi Minato-ku, Tokyo 105-0004
Japan Baking Industry Assoc.	Tel: 03-3667-1976 Fax: 03-3667-2049 www.fsic.co.jp/food/pan	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Bento Manufacturers Assoc.	Tel: 03-3356-1575 Fax: 03-3356-1817 (n.a.)	Shinichi Bldg. 10F, 2-8 Yotsuya Shinjuku-ku, Tokyo 160-0004
Japan Canners Assoc.	Tel: 03-3213-4751 Fax: 03-3211-1430 www.jca-can.or.jp	Yurakucho Denki Bldg, 1-7-1 Yurakucho Chiyoda-ku, Tokyo 100-0006
Japan Cheese Promotion Council	Tel: 03-3264-4133 Fax: 03-3264-4139 www.cheesefesta.com	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Dairy Industry Assoc.	Tel: 03-3261-9161 Fax: 03-3261-9175 www.jdia.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Delica Foods Manufacturers Assoc.	Tel: 03-3263-0957 Fax: 03-3263-1325 www.souzai.or.jp	Noda Bldg. 302, 10-6 Ichibancho Chiyoda-ku, Tokyo 102-0082
Japan Dry Fruits Importers Assoc.	Tel: 03-3253-1234 Fax: 03-5256-1914 (n.a.)	c/o Shoei Foods Corp. 5-7 Akihabara, Taito-ku, Tokyo 110-0066
Japan Freeze Dry Food Industry Assoc.	Tel: 03-3432-4664 Fax: 03-3459-4654 (n.a.)	c/o Nihon Shokuryo Shimbun 1-9-9 Yaesu, Chuo-ku, Tokyo 103-0028

Japan Frozen Foods Assoc.	Tel: 03-3667-6671 Fax: 03-3669-2117 www.reishokukyo.or.jp	10-6 Nihonbashi -Kobunacho Chuo-ku, Tokyo 103-0024
Japan Grain Importers Assoc.	Tel: 03-3274-0172 Fax: 03-3274-0177 (n.a.)	Mizuho Kaikan, 2-1-16 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Ham & Sausage Processors Assoc.	Tel: 03-3444-1211 Fax: 03-3441-8287 http://group.lin.go.jp/hamukumi/	1-5-6 Ebisu Shibuya-ku, Tokyo 150-0013
Japan Health Food Assoc.	Tel: 03-3268-3131 Fax: 03-3268-3135 www.health-station.com/jhnfa	2-7-27 Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Japan Honey Assoc.	Tel: 03-3291-8628 Fax: 03-3291-8629 http://group.lin.go.jp/bee/	Bajichikusan Kaikan, 1-2 Kanda Surugadai Chiyoda-ku, Tokyo 101-0062
Japan Ice Cream Assoc.	Tel: 03-3264-3104 Fax: 03-3230-1354 www.icecream.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Marine Products Importers Assoc.	Tel: 03-5280-2891 Fax: 03-5280-2892 www.ifta.or.jp	Kamakurabashi Bldg., 1-7-1 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Meat Traders Assoc.	Tel: 03-3588-1665 Fax: 03-3588-0013 (n.a.)	Daini Watanabe Bldg., 1-7-3 Higashi Azabu Minato-ku, Tokyo 106-0044
Japan Potato Chips Manufacturers Assoc.	Tel: 03-3902-8877 Fax: 03-3902-9131 (n.a.)	c/o Calbee, 1-20-1 Akabane Minami Kita-ku, Tokyo 115-0044
Japan Processed Tomato Industry Assoc.	Tel: 03-3639-9666 Fax: 03-3639-9669 www.japan-tomato.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Sauce Industry Assoc.	Tel: 03-3639-9667 Fax: 03-3639-9669 (n.a.)	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Soba Noodle Assoc.	Tel: 03-3264-3801 Fax: 03-3264-3802 (n.a.)	2-4 Kanda Jinbocho Chiyoda-ku, Tokyo 101-8420
School Meal Manufacturers Assoc.	Tel: 03-3486-3256 Fax: 03-3498-1346 (n.a.)	c/o Q.P, 1-4-13 Shibuya Shibuya-ku, Tokyo 150-0002

Figure F-6b: Japanese Associations - Beverages

Organization Name	Telephone/Fax URL	Address
All Japan Coffee Assoc.	Tel: 03-5649-8377 Fax: 03-5649-8388 http://coffee.ajca.or.jp	Max Bldg., 6-2 Nihonbashi Hakozaicho Chuo-ku, Tokyo 103-0015
Brewers Association of Japan	Tel: 03-3561-8386 Fax: 03-3561-8380 www.brewers.or.jp	Showa Bldg., 2-8-18 Kyobashi Chuo-ku, Tokyo 104-0031
Japan Fruit Juice Assoc.	Tel: 03-3275-1031 Fax: 03-3275-1067 (n.a.)	Daini Toyo Bldg. 5F, 2-1-21 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Mineral Water Assoc.	Tel: 03-3350-9100 Fax: 03-3350-7960 (n.a.)	Fujiwara Bldg. 5F, 2-9-17 Shinjuku-ku, Shinjuku, Tokyo 160-0022
Japan Soft Drinks Assoc.	Tel: 03-3270-7300 Fax: 03-3270-7306 www.j-sda.or.jp	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors Makers Assoc.	Tel: 03-3668-4621 Fax: 03-3688-7077 www.winery.or.jp	1-1-6 Nihonbashi- Kayabacho Chuo-ku, Tokyo 103-0025
Japan Wine & Spirit Importers Assoc.	Tel: 03-3503-6505 Fax: 03-3503-6504 (n.a.)	1-13-5 Toranomon Minato-ku, Tokyo 105-0001

Figure F-6c: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
All Japan Supermarket Assoc.	Tel: 03-3207-3157 Fax: 03-3207-5277 www.super.or.jp	Okubo Fuji Bldg., 2-7-1 Okubo Shinjuku-ku, Tokyo 169-0072
Japan Chain Store Assoc.	Tel: 03-3433-1290 Fax: 03-3433-1297 www.jcsa.gr.jp	5-13-1 Toranomon Minato-ku, Tokyo 105-0001
Japan Department Store Assoc.	Tel: 03-3272-1666 Fax: 03-3281-0381 www.depart.or.jp	Yanagiya Bldg. 7F, 2-1-10 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Food Service Assoc.	Tel: 03-5403-1060 Fax: 03-5403-1065 www.jfnet.or.jp	1-29-6 Hamamatsucho Minato-ku, Tokyo 105-0013

Japan Food Service Wholesalers Assoc.	Tel: 03-3292-8225 Fax: 03-3295-9169 www.gaishokukyo.or.jp	Hiratom Bldg. 6F, 1-10-1 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Franchise Chain Assoc.	Tel: 03-5777-8701 Fax: 03-5777-8711 http://jfa.jfa-fc.or.jp/	Daini Akiyama Bldg., 3-6-2 Toranomom Minato-ku, Tokyo 105-0001
Japan Hotel Assoc.	Tel: 03-3279-2706 Fax: 03-3274-5375 www.j-hotel.or.jp	Shin Otemachi Bldg., 2-2-1 Otemachi Chiyoda-ku, Tokyo 100-0004
Japan Medical Food Service Assoc.	Tel: 03-3595-4281 Fax: 03-3595-4282 www.j-mk.or.jp	Araki Bldg. 2F, 1-5-7 Nagatacho Chiyoda-ku, Tokyo 100-0014
Japan Processed Foods Wholesalers Assoc.	Tel: 03-3241-6568 Fax: 03-3241-1469 (n.a.)	Edo Bldg., 2-5-11 Nihonbashi- Muromachi Chuo-ku, Tokyo 102-0022
Japan Restaurant Assoc.	Tel: 03-3571-2438 Fax: 03-3571-7090 www.joy.ne.jp/restaurant	8-10-8 Ginza Chuo-ku, Tokyo 104-0061
Japan Retailers Assoc.	Tel: 03-3283-7920 Fax: 03-3215-7698 www.japan-retail.or.jp	3-2-2 Marunouchi Chiyoda-ku, Tokyo 100-0005